



THE SALTERNS ACADEMY TRUST: TRAFALGAR SCHOOL

SUPPORT STAFF APPRAISAL POLICY



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RRSA ARTICLE 42: All adults and children should know about the UNCRC.

1. **INTRODUCTION**

Appraisal in this school will be a supportive and developmental process designed to ensure that all Support Staff have the skills and support they need to carry out their roles effectively. It will help to ensure that Support Staff are able to continue to improve and develop their professional practice.

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

All Support Staff should be made aware of and have access to the appraisal policy.

2. **APPLICATION OF THE APPRAISAL POLICY**

This policy applies to all Support Staff employed at the school, except those on contracts of less than one term and employees on the capability procedure.

This policy does not apply to staff who work at the school as part of a Service Level Agreement with their employer.

3. **THE APPRAISAL PERIOD**

The appraisal period will run **for 12 months**, normally from September to August.

Support Staff 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.

Where a member of Support Staff starts their employment at the school part-way through a cycle, the Headteacher shall determine the length of the first appraisal cycle for the member of Support staff, with a view to bringing his/her cycle into line with the cycle for other Support Staff as soon as possible.

Where a member of Support Staff transfers to a new post within the school part-way through a cycle, the Headteacher shall determine whether the cycle shall begin again and whether to change the appraiser.

4. **APPOINTING APPRAISERS**

The choice of appraiser is for the Headteacher. Where the member of Support Staff is of the opinion the appraiser appointed is unsuitable, s/he may submit a written request to the Headteacher for the appraiser to be replaced, stating the reasons for the request. The concerns will be carefully considered.

Where it becomes apparent that the appraiser appointed by the Headteacher will be absent for the majority of the appraisal cycle, the Headteacher may perform those duties herself/himself or delegate those duties to another member of staff for the duration of that absence.

If the Headteacher appoints an appraiser who is not the member of Support Staff's line manager, the appraiser to whom s/he delegates those duties will have an appropriate position in the staffing structure, together with the necessary background knowledge, skills and training to undertake the role.

Where a member of Support Staff is experiencing difficulties or there are concerns about performance, the Headteacher may undertake the role of appraiser.

5. **SETTING OBJECTIVES**

- 5.1. Objectives will be set before, or as soon as practicable after, the start of each appraisal period. The objectives set will be Specific, Measurable, Achievable, Realistic and Time-bound and will be appropriate to the appraisee's role. In setting the objectives, the appraiser will have regard to what can reasonably be expected in the context of roles, responsibilities and experience, consistent with the school's strategy for achieving a manageable workload for all staff.
- 5.2. The appraiser and appraisee will seek to agree the objectives. Objectives may be revised if circumstances change. Should the objectives not be agreed, the final decision on allocation of objectives rests with the Headteacher. Appraisees may at any point append their comments alongside their objectives.
- 5.3. The school is committed to ensuring consistency of treatment and fairness in the operation of the appraisal process. Support Staff objectives and written appraisal records will be reviewed to check consistency of approach.
- 5.4. Support Staff will have no more than 3 objectives.
- 5.5. The objectives set for Support Staff will, if achieved, contribute to the school's plans for improving the school's educational provision and performance and improving the education of students at the school.

6. **REVIEWING PERFORMANCE**

6.1. **Evidence**

Evidence considered for the achievement of objectives may include data, written documentation, observation or evidence from others with professional knowledge including self-assessment from the Appraisee and Appraiser (Appendix 1/Appendix 2).

The evidence used for appraisal purposes will be clear, appropriate and fit for purpose. Evidence should demonstrate competencies relating to personal job role and responsibilities and their investment in professional learning and development.

Classroom observations may be appropriate for those staff working with students in the classroom and will be undertaken in accordance with school's agreed classroom observation protocol (Appendix 3).

6.2. **Development and Support**

Appraisal is a supportive process which will be used to inform continuing professional learning and development. The school wishes to encourage a culture in which all Support Staff take responsibility for improving their practice and effectiveness in role through appropriate professional development. Professional Learning and Development will be linked to school improvement priorities and to the on-going professional development needs and priorities of individual members of Support Staff. All Support Staff will be expected to meet the Trafalgar School Professional Learning Expectations for Support Staff.

The school's Professional Learning and Development programme will be informed by the training and development needs identified as part of the appraisal process. The Governing Body will ensure in the budget planning that, as far as possible, resources are made available in the school budget for appropriate training, and support agreed for appraisees, maintaining access on an equitable basis over time.

An account of the training and development needs of members of support staff including the instances where it did not prove possible to provide any agreed Professional Learning and Development, will form part of the Headteacher's annual report to the Governing Body about the operation of the appraisal process in the school.

With regard to the provision of Professional Learning and Development, in the case of competing demands on the school budget, a decision on relative priority will be taken with regard to the extent to which:

- the training and support will help the school to achieve its priorities; and
- the Professional Learning and Development identified is essential for an appraisee to meet their objectives.

The school's priorities will have precedence.

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

7. ANNUAL ASSESSMENT/REVIEW MEETING

Two interim review meetings take place during each appraisal cycle in addition to the annual Appraisal Review meeting which takes place in September.

Each member of Support Staff's performance will be formally assessed in respect of each appraisal period.

Support Staff will be required to submit their Appraisal Evidence folder to their appraiser at the annual Appraisal Review meeting (see Appendix 4). This evidence folder will form the basis of the discussion that leads to the assessment at the meeting.

The Support Staff Appraisal Review Report will be produced by the Appraiser as the outcome of the Appraisal Review Meeting and the Appraisee As soon as practicable following the end of each appraisal period, the member of Support Staff will have the opportunity to comment on the written appraisal report. The Appraisal Report will include:

- details of the member of Support Staff's objectives for the appraisal period in question;
- an assessment of the member of Support Staff's performance against their objectives;
- an assessment by the Appraisee and Appraiser of performance against the Trafalgar School expectations for Support Staff (as outlined in Appendix 1);
- a narrative summary by the Appraiser of overall performance for the Appraisal cycle;
- a space for the member of Support Staff's own comments;
- an overall judgement about performance in the Appraisal cycle.

A review meeting will take place to discuss the content of the report and any further action required and to inform objective setting for the next cycle (Appendix 5).

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

8. **SUPPORT STAFF EXPERIENCING DIFFICULTIES/CONCERNS ABOUT THEIR PERFORMANCE**

When dealing with a member of Support Staff experiencing difficulties, the objective is to provide support and guidance through the appraisal process in such a way that the member of Support Staff's performance improves and the problem is therefore resolved.

Where it is apparent that a member of Support Staff is experiencing difficulties at school, Structured Managerial Support will be offered as soon as possible, without waiting for the formal annual assessment.

If an appraiser identifies through the appraisal process that the member of Support Staff is experiencing confirmed difficulties, or it is identified via another source of information that there are concerns about any aspect of the member of Support Staff's performance, the appraiser, the Headteacher, or a member of the leadership team, will, as part of the appraisal process give the member of Support Staff at least 5 working days' notice that a meeting will be held to discuss targets for improvement alongside a programme of Structured Managerial Support. The member of Support Staff will be given a copy of the capability procedure.

The member of Support Staff will also be advised to contact their Trade Union or a work colleague.

The appraiser, Headteacher or a member of the leadership team will:

- give clear written feedback to the member of Support Staff about the nature and seriousness of the concerns;
- give the member of Support staff the opportunity to comment on and discuss the concerns;
- in consultation with the member of Support Staff at the meeting, will establish an action plan with support (for example coaching, training support, mentoring,,) that will help address those specific concerns;
- make clear how progress will be monitored and when it will be reviewed;
- explain the implications and the process if no, or insufficient improvement is made.

The member of Support Staff's progress will continue to be monitored as part of the appraisal process and a reasonable time given for their performance to improve. The length of the support period will depend on the circumstances of the individual case but will be a minimum of 6 weeks and can be extended to a maximum of 15 weeks if insufficient evidence of progress is made.

Appropriate support as agreed in the Action Plan will be given, in order that the aim of recovering and improving performance can be achieved. During this monitoring period the member of Support Staff will be given regular feedback on progress and arrangements will be made to modify the support programme if appropriate.

If sufficient progress is made so that the member of Support Staff is performing at a level that indicates there is no longer a possibility of capability procedures being invoked, the member of Support Staff should be informed of this at a formal meeting with the appraiser, Headteacher or member of the leadership team. Following this meeting the appraisal process will continue as normal.

If no, or insufficient, improvement has been made over this period, the member of Support Staff will be invited to a transition meeting to determine whether capability proceedings need to commence.

The member of Support Staff may be accompanied by a Trade Union representative or work colleague and will have at least 5 working days' notice of the meeting.

9. **APPEALS**

Appraisees have a right of appeal to the Headteacher or the Local Governing Body (if the Headteacher is the Appraiser) against any of the entries in the written appraisal report. Appeals should be made in writing within 5 working days of receiving the written appraisal report.

10. **GENERAL PRINCIPLES UNDERLYING THE POLICY**

10.1. **Consistency of Treatment and Fairness**

The Governing Body is committed to ensuring consistency of treatment and fairness and will abide by all relevant equality legislation.

10.2. **Confidentiality and Professional Relationships**

The appraisal process will be treated with confidentiality. Only the appraiser's line manager or, where s/he has more than one, each of her/his line managers will be provided with access to the employee's written appraisal report. This will be done upon request and only where this is necessary to enable the line manager to discharge her/his line management responsibilities.

The Governing Body recognises that the reviewer will consult with, and seek to secure the agreement of, the employee before seeking information from other colleagues about the work of the employee as part of the normal appraisal process.

However, the desire for confidentiality does not override the need for the Headteacher and Governing Body to quality-assure the operation and effectiveness of the appraisal system. The Headteacher or appropriate colleague might, for example, review individual's objectives and written appraisal records personally – to check consistency of approach and expectation between different appraisers.

This quality assurance is delegated by the Local Governing Body to the Headteacher in the Autumn Term and the Headteacher will provide a written report to Governors in the spring term.

10.3. **Monitoring and Evaluation**

The Governing Body and Headteacher will monitor the operation and effectiveness of the school's appraisal arrangements.

The Headteacher will provide the Governing Body with a written report on the operation of the school's appraisal policy annually. The report will not identify any individual by name.

An account of the training and development needs of members of staff including the instances where it did not prove possible to provide any agreed Professional Learning and Development will form part of the report.

The report will include an assessment of the impact of the policy on all staff.

- Race
- Gender
- 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.

10.4. **Retention**

The appraisal records will be retained for a minimum period of 6 years.

THE SELF-ASSESSMENT PROCESS

Each member of Support Staff will conduct a self-assessment with reference to relevant standards, competencies, expectations and skills, job descriptions and person specifications.

The self-assessments will then be presented in the Appraisal Review Folder and discussed at the Appraisal Review meeting to review evidence judge performance for the previous cycle and set objectives for the coming appraisal period and to determine any professional development requirements.

How to conduct the Self-Assessment and use it to inform Appraisal Objectives

The purpose of the Self-Assessment is to determine those areas of an employee's work where further development may be beneficial and, therefore, on which appraisal objectives should focus.

The Self-Assessment document makes use of the following ratings: 'Partly Meets Expectations', 'Meets Expectations' and 'Exceeds Expectations'.

Staff are asked to rate their performance in the following key Skills and Expectations areas prior to their Appraisal Review Meeting:

- Job and Professional Knowledge/Skills
- Commitment and Motivation
- Planning and Personal Organisation
- Relationships with Colleagues
- Customer Focus
- Communication
- Problem Solving and Decision Making
- TA's/HTLA's will be assessed against the TA Standards.

For Managers, there are two additional Self-Assessment areas:

- Managing Objectives
- Managing People

Steps in conducting the Self-Assessment

1. Consult the national and/or school based standards/competencies relevant to the post and in the employee's job description and/or person specification.
2. Read the descriptors at the end of this Appendix.
3. Put a tick in the relevant grading column for each area on the Self-Assessment form (Appendix 4) with notes for providing evidence.
4. If there is any area where your grading is 'Partly Meets Expectations' use the final column on the Self-Assessment form (Appendix 4) to suggest a possible appraisal objective for the following cycle. If your grading is either 'Meets Expectations' or 'Exceeds Expectations', suggest a possible objective to help maintain or further develop existing good practice.

Skills and Expectations

The following Expectations and skills form part of the Self-Assessment and will inform Appraisal objectives for the next cycle.

1. *Job and Professional Knowledge/Skills:* Developing and maintaining a high level of job and professional knowledge/skills and using these to provide and excellent service and achieve organisational objectives.

2. *Commitment and Motivation:* Taking personal responsibility for your own development, demonstrating self-motivation and commitment towards achieving results and applying yourself in a positive manner to the work of the organisation.
3. *Planning and Personal Organisation:* maximising efficiency, prioritising workload appropriately and focussing on the right areas to ensure the achievement of own/team and organisational objectives.
4. *Relationships with Colleagues:* Building and maintaining productive and harmonious working relationships within own team and across the wider organisation.
5. *Customer Focus:* Responding proactively to customers' needs, both internal and external, to ensure the delivery of high quality, efficient services.
6. *Communication:* Effectively communicating appropriate information through a range of mechanisms to ensure clarity and understanding and achieve organisational objectives.
7. *Problem Solving and Decision-Making:* Analysing problems and evaluating options and risks to identify most appropriate solutions and taking effective action through sound judgement.
8. *Team Working:* Working effectively with others within own team and across the wider organisation to achieve results in the job, team goals and organisational objectives.
9. *TA Standards:* used in lesson observation, learning walks and self assessment.

Additional Skills and Expectations for Managers

10. *Managing Objectives:* Making the best possible use of your resources at work, prioritising appropriately, consulting with others and ensuring resources and efforts are focused on key organisational objectives and goals.
11. *Managing People:* Effectively leading and managing a team, dealing with team and individual problems, counselling and coaching others to achieve results and encouraging and supporting the team in their activities.

Judging Performance

<i>Exceeds Expectations:</i>	An employee who has no significant areas for development would normally qualify for an 'Exceeds Expectations' rating in each category.
<i>Meets Expectations:</i>	An employee who has a few areas for development would normally qualify for a 'Meets Expectations' in each category.
<i>Partly Meets Expectations:</i>	An employee who has a significant number of areas for development would normally qualify for a 'Partly Meets Expectations'.

SKILLS AND EXPECTATIONS

1. Job and Professional Knowledge/Skills

Strengths	Areas Requiring Improvement
<ul style="list-style-type: none"> • Develops and maintains a high professional knowledge base. • Is aware of best practice and constantly seeks ways to apply it. • Keeps up to date with internal and external changes affecting job. • Demonstrates commitment to continuous professional development. • Quickly assimilates new information/ knowledge. • Able to fully utilise job-related Technology. • Attends all relevant training. • Sets high professional and personal standards. • Effective networker. • Able to fulfil Health and Safety responsibilities. 	<ul style="list-style-type: none"> • Is still not yet developing a professional knowledge base, or may have allowed skills to erode over time. • Has not kept up to date with relevant changes affecting job. • Not yet displaying a full commitment to continuous professional development. • Has not attended all relevant training. • Not yet willing to admit to current capabilities. • Less effective at networking.

2. Commitment and Motivation

Strengths	Areas Requiring Improvement
<ul style="list-style-type: none"> • Takes personal responsibility for own development. • Looks for ways of improving job performance • Self-motivated and committed to achieving results. • Positive and enthusiastic approach. • Sensitive and respectful towards others • Takes responsibility to resolve difficult issues. • Handles conflict well. • Tactful and diplomatic. • Understands and is sensitive to organisational culture. • Keeps emotions under control. • Fair minded and even handed in approach to others. • Responds well to pressure. 	<ul style="list-style-type: none"> • Not yet accepting personal responsibility for own development. • Does not yet exhibit interest in improving job performance. • Can lack self-motivation and may currently only do minimum to get by. • Often indecisive when approached for advice/ decision. • Does not yet demonstrate a positive attitude and approach. • Not yet willing to take tough decisions. • May appear to lack self-confidence and be perceived as anxious in dealings with others. • Can be insensitive/abrupt when dealing with others. • Not yet able or willing to confront and resolve difficult issues. • Does not yet show an understand of the organisational culture/climate. • May be perceived as showing favouritism in dealings with others.

3. Planning and Personal Organisation

Strengths	Areas Requiring Improvement
<ul style="list-style-type: none"> • Focuses resources/effort appropriately. • Understands need for change, willing to working practices. • Prioritises workload appropriately. • Adaptable and flexible approach. • Plans ahead, sets timescales and deadlines and adheres to them. • Perseveres when faced with difficulties, tenacious and determined. • Focuses on achieving results. • Checks and critiques own work performance. • Prepared to tackle major challenges. • Anticipates problems and responds effectively. 	<ul style="list-style-type: none"> • Does not yet focus effort/resources appropriately. • To yet willing to accept change, inflexible, operates in "comfort zone". • Not yet actively prioritising workload, has to be directed. • Not yet planning ahead. • Not yet structured and focused in working practices. • Not yet setting clear goals and targets for self. • Often gives up when faced with obstacles. • Not yet achieving results. • Does not yet have insight into own work performance. • Not yet actively anticipating problems. • Not currently giving attention to organisation/ team objectives in prioritising own work.

4. Relationships with Colleagues

Strengths	Areas Requiring Improvement
<ul style="list-style-type: none"> • Sensitive and respectful towards all colleagues. • Challenges poor behaviour among colleagues. • Actively builds working relationships at all levels • Deals effectively with conflict. • Tackles and resolves issues appropriately to achieve best outcomes. • Listens well and respects the opinions of colleagues. 	<ul style="list-style-type: none"> • Sometimes insensitive or disrespectful towards colleagues. • Sometimes talks inappropriately about colleagues. • Sometimes is perceived and behaves unreasonable towards colleagues. • Not yet actively challenging poor behaviour among colleagues. • Not yet confident handling conflict. • Sometimes has difficulty seeing other points of view.

5. Customer Focus

Strengths	Areas Requiring Improvement
<ul style="list-style-type: none"> • Shows willingness to help customers. • Responds effectively to queries, provides accurate information. • Adopts a pleasant, helpful and professional manner. • Delivers on time for the customer, whether internal or external. • Effective at drawing out information and understanding customer needs. • Keeps the customer informed of any changes to arrangements etc. • Explains problems/issues to customers. • Adjusts style to suit the audience – formal/informal. • Calms volatile situations. • Deals effectively with angry customers, eg defuses the situation, calls for assistance. • Sensitive to pressures on customers and acts to ensure problems quickly resolved. • Looks for way to improve service deliver. 	<ul style="list-style-type: none"> • Not yet developed a consistently friendly, efficient and helpful demeanour with customers. • Sometimes provides incorrect information, makes errors/mistakes in communications. • Does not yet respond to queries within reasonable timescales. • Does not yet fully understand customer needs. • Reacts only to specific requests, is not yet proactive in anticipating customer responses needed. • Does not yet fully appreciate or respond to the needs of internal customers. • Sometimes articulates inappropriately that customer expectations are unreasonable. • Is not yet able to draw out relevant information from customers. • Sometimes fails to keep the customer informed. • Blames problems on others and is not yet able to accept responsibility.

6. Communication

Strengths	Areas Requiring Improvement
<ul style="list-style-type: none"> • Open, clear and consistent communication style. • Passes relevant information on to colleagues. • Actively listens and lets others speak, encourages open discussion. • Clarifies information and asks questions. • Checks understanding. • Keeps other informed. • Explains things clearly and concisely, gives clear instructions. • Writes well, uses appropriate tone, avoids unnecessary jargon and ensures information is accurate and complete. • Ensures communications is a two way process. • Adapts style to the situation, uses language appropriate to the audience. • Communicates in a planned way. 	<ul style="list-style-type: none"> • Sometimes has a confused communications style, which is difficult to understand. • Not yet passing on relevant information, sometime withholding it. • Sometimes interrupts others and is perceived to not listen. • Not yet actively obtaining all relevant information. • Sometimes passes on inaccurate information. • Sometimes is perceived to misinterpret information. • Not yet actively keeping others informed. • Not yet explaining things well, verbal communication may be unstructured. • Sometimes communicates excessively/giving too much detail. • Does not yet show good written communication; uses jargon/incorrect English and inaccurate or incomplete which may be perceived to be misleading. • Does not yet show the ability to adapt style to audience or gauge understanding.

7. Problem Solving and Decision-making

Strengths	Areas Requiring Improvement
<ul style="list-style-type: none"> • Willing to accept personal responsibility for finding and implementing solutions. • Uses initiative appropriately to find practicable/ workable solutions. • Demonstrates patience and common sense. • Seeks advice and consults others appropriately. • Works through problems, analyses well, assesses risks and seeks out information. • Exercises sound judgement and applies knowledge. • Refers to line manager where appropriate. • Takes an unbiased and objective approach. • Able to provide rationale for decision. • Able to detect patterns and trends. • Anticipates impact and consequences and takes appropriate action. • Keeps problems in perspective. • Responds quickly to urgent issues. • Has the confidence to decide when no action is necessary • Explores alternative outside familiar territory. • Willing to take unpopular/tough decisions • Regularly review decisions to see if they are still working. 	<ul style="list-style-type: none"> • Seems unwilling to accept personal responsibility for finding and implementing solutions. • May appear to lack initiative. • Sometimes does not seek advice and consult appropriately. • Is perceived to not elicit all relevant information, may look at problem in isolation. • Sometimes does not think the problem and risks through logically. • Is perceived to jump to conclusions, may make snap decisions or over-react. • May opt for a quick fix when it is not appropriate. • Does not yet show good judgement. • Can refer issues to line manager inappropriately. • May not show objectivity in decision-making. • Is perceived to procrastinate or unable to make a decision. • Does not yet demonstrate learning points from problem situations. • Does not yet show tackling of the big issue. • Does not yet demonstrate the willingness to take unpopular/tough decisions. •

8. Team working

Strengths	Areas Requiring Improvement
<ul style="list-style-type: none"> • Offers assistance and support without prompting. • Willing to listen and offer help/advice when needed. • Communicates well with all team members. • Encourages input from others and acknowledges their work. • Contributes to team to best of ability. • Prepared to listen and responds well to advice/guidance. • Sees own team within the context of the wider organisation. • Pulls together cross functional teams. • Represents the team effectively, internally and externally. • Publicly credits others who have performed well • Speaks in positive terms about other team members. 	<ul style="list-style-type: none"> • Does not yet demonstrate assistance when required or when others clearly struggling. • Can be perceived to blame others within the team for problems. • May appear to be concerned with doing own job, ignores the needs of others. • Is perceived to create a negative atmosphere within the team. • Not yet able to contribute to team when capable. • Often puts own agenda ahead of team/ organisational needs. • Is perceived to assume everyone sees issues in his/her terms. • May be poor representative for the team. • May appear to pay no attention to impact on colleagues of how own work is delivered and at what pace.

9. Teaching Assistant Standards (for TA's and HTLAs only)

TA Standards

- Adopt relevant strategies to support the work of the teacher and increase student progress.
- Promote and facilitate inclusion by encouraging student participation in learning
- Use effective behaviour management strategies consistently in line with school policy
- Contribute to effective assessment and planning (monitoring, recording and reporting pupil progress)
- Communicate effectively and sensitively with pupils to adapt to their needs and support their learning
- Demonstrate a level of subject knowledge and apply this effectively to support the students learning and progress.
- Know and adapt resources to meet individual needs.
- Work collaboratively with the classroom teacher to plan effective lessons.

Additional Skills and Expectations for Managers

10. Managing Objectives

Strengths	Areas Requiring Improvement
<ul style="list-style-type: none">• Focuses resources on appropriate issues.• Sees the important underlying issues.• Strong critical awareness about what needs doing.• Knows what to tackle personally or to delegate.• Views objectives as part of the organisational whole.• Recognises the importance of aligning efforts with colleagues.• Seeks to get involved in wider initiatives and projects.• Effective at planning, monitoring and reviewing.• Competent to fulfil Health and Safety management responsibilities.	<ul style="list-style-type: none">• Is not able to prioritise actions according to immediate demands.• Does not yet see the longer term or wider organisational implications.• Is not yet able to network.• Does not yet engage with organisation wide initiatives or projects.• Is not yet able to take a strategic role and co-ordinate others.• Not yet critically minded in appraisal of what needs doing.• Does not yet manage time effectively.

11. Managing People

Strengths	Areas Requiring Improvement
<ul style="list-style-type: none">• Strong insight into managing people.• Understands how to build and maintain strong relationships.• Strong insight into how to motivate others.• Provides strong leadership and direction.• Demonstrates coaching/counselling skills.• Communicates and consults on change.• Considers impact of actions on on-going relationships with staff.• Takes a pro-active approach to dealing with staff issues.• Non-judgemental approach to dealing with people.• Deals positively and constructively with problems.• Leads by example, positive role model.• Concerned for the wellbeing of staff.• Promotes equality of opportunity.• Manages change effectively and concerned for impact on team/individuals.	<ul style="list-style-type: none">• Does not yet exhibit handling of staffing issues and problems.• Is not yet able to reflect on own view of team and ensure all staff are treated with respect.• May appear to dismiss problems, be judgemental or react negatively to issues.• Does not yet demonstrate insight into managing people.• Not yet able or willing to motivate team/individuals.• Does not yet show support/coaching.• May be perceived as unwilling to tackle team motivation/performance issues.• Does not yet lead by example, poor role model.• Can be perceived as being unconcerned for the wellbeing of staff.• Is perceived as managing change ineffectively.• Not yet able to promote equality of opportunity.

SUPPORT STAFF SELF-ASSESSMENT AND PROFESSIONAL DEVELOPMENT OBJECTIVE PLANNER

NAME: _____ DATE: _____ JOB ROLE : _____

Skills and Expectations for all Support Staff	Exceeds Expectations	Meets Expectations	Partly Meets Expectations	Evidence	Possible Appraisal Objective
Job and Professional Knowledge/Skills (see any national standards/competencies, school standards/competencies or job description relevant to your post)					
Commitment and Motivation (see descriptors)					
Planning and Personal Organisation (see descriptors)					
Relationships with Colleagues (see descriptors)					

Skills and Expectations for all Support Staff	Exceeds Expectations	Meets Expectations	Partly Meets Expectations	Evidence	Possible Appraisal Objective
Customer Focus (see descriptors)					
Communication (see descriptors)					
Problem-solving and Decision-making (see descriptors)					
TA Standards					
Skills and Expectations for Managers					
Managing Objectives (see descriptors)					
Managing People (see descriptors)					

CLASSROOM OBSERVATION PROTOCOL

The governing body is committed to ensuring that classroom observation is developmental and supportive and that those involved in the process will:

- Carry out the role with professionalism, integrity and courtesy;
- Evaluate objectively;
- Report accurately and fairly; and
- Respect the confidentiality of the information gained.

The total period for classroom observation arranged for any teacher will not exceed three hours per cycle having regard to the individual circumstances of the teacher.

There will be a reasonable amount of time between classroom observations, irrespective of the purpose of those observations.

The arrangements for classroom observation will be included in the planning and review statement and will:

- Include the amount of observation;
- Specify its primary purpose;
- Specify any particular aspects of the teacher's performance which will be assessed;
- Specify the duration of the observation;
- Specify which day the observation will take place; and
- Specify who will conduct the observation.

Where evidence emerges about the reviewee's teaching performance which gives rise to concern during the cycle, classroom observations may be arranged in addition to those recorded at the beginning of the cycle, subject to a revision meeting being held in accordance with the regulations.

Classroom observation will be undertaken solely by persons with qualified teacher status. In addition, in the school, classroom observation will only be undertaken by those who have the appropriate professional skills who will be able to undertake observation and who can provide constructive oral and written feedback and support of the reviewees.

Oral feedback from classroom observation for the purposes of performance management will be given as soon as possible after the observation and no later than the end of the following working day.

Written feedback will be provided within five working days of the observation taking place.

The written record of feedback will include the date on which the observation took place, the lesson observed and the length of the observation. The reviewee will be able to append written comments to the feedback document. No written notes in addition to the written feedback will be kept.

Teachers will have access to all written accounts of the observations after their lessons.

Visits to classrooms by the Headteacher or senior staff in order to support teachers or talk to students

are separate from this classroom observation protocol.

A Headteacher has a duty to evaluate the standards of teaching and learning and to ensure that proper standards of professional performance are established and maintained.

The Headteacher, senior staff and subject leaders have a right to drop in to inform their monitoring of the quality of teaching and learning. Drop ins will only inform the appraisal process where evidence arises which merits the revision of the, appraisal objectives in accordance with the provisions of the regulations.



SUPPORT STAFF APPRAISAL REPORT

2019-2020

REVIEW OF CYCLE JUST ENDED

OBJECTIVES REVIEWED

<i>OBJECTIVE</i>	<i>EVIDENCE TO SHOW OBJECTIVE HAS BEEN MET</i>	<i>EXCEEDED/MET/ (given feasibility in cycle) PARTLY MET/ NOT MET</i>

SUMMARY OF EXPECTATIONS

SKILLS AND EXPECTATIONS	APPRAISEE JUDGEMENT			APPRAISER JUDGEMENT		
	EXCEEDS EXPECTATIONS	MEETS EXPECTATIONS	PARTLY MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	MEETS EXPECTATIONS	PARTLY MEETS EXPECTATIONS
<i>Job and Professional Knowledge/Skills:</i> Developing and maintaining a high level of job and professional knowledge/skills and using these to provide and excellent service and achieve organisational objectives.						
<i>Commitment and Motivation:</i> Taking personal responsibility for your own development, demonstrating self-motivation and commitment towards achieving results and applying yourself in a positive manner to the work of the organisation.						
<i>Planning and Personal Organisation:</i> maximising efficiency, prioritising workload appropriately and focussing on the right areas to ensure the achievement of own/team and organisational objectives.						
<i>Relationships with Colleagues:</i> Building and maintaining productive and harmonious working relationships within own team and across the wider organisation.						
<i>Customer Focus:</i> Responding proactively to customers' needs, both internal and external, to ensure the delivery of high quality, efficient services.						
<i>Communication:</i> Effectively communicating appropriate information through a range of mechanisms to ensure clarity and understanding and achieve organisational objectives.						
<i>Problem Solving and Decision-Making:</i> Analysing problems and evaluating options and risks to identify most appropriate solutions and taking effective action through sound judgement.						
<i>Team Working:</i> Working effectively with others within own team and across the wider organisation to achieve results in the job, team goals and organisational objectives.						
<i>TA Standards:</i> All the standards have been met in lesson observations, learning walks and student outcomes.						
<i>Additional Expectations for Managers</i>						
<i>Managing Objectives:</i> Making the best possible use of your resources at work, prioritising appropriately, consulting with others and ensuring resources and efforts are focused on key organisational objectives and goals.						
<i>Managing People:</i> Effectively leading and managing a team, dealing with team and individual problems, counselling and coaching others to achieve results and encouraging and supporting the team in their activities.						

Assessment of Appraisal and cycle just ended

Reviewee Comments

	Exceeds Expectations	Meets Expectations	Partly Meets Expectations
Overall judgement of Performance			

	Individual Objectives		Skills and Expectations
Exceeds Expectations	All objectives are achieved. Performance is exceptional in all respects;	and	Your skills and Expectations consistently exceeds expectations
Meets Expectations	All objectives are achieved that are feasible within the previous cycle. Performance meets the standards required;	and	Your skills and Expectations consistently meets the required standard.
Partly Meets Expectations	Some objectives were achieved. A number of key tasks may not have been achieved to the required standard.	and	Your skills and Expectations fall short of the required standard on some occasions.



SUPPORT STAFF APPRAISAL OBJECTIVE SETTING

2020-2021

AGREED OBJECTIVES

Objectives for the next cycle including any relevant whole school/team objectives

<i>OBJECTIVE</i>	<i>SIP REFERENCE</i>

PROFESSIONAL LEARNING AND DEVELOPMENT NEEDS IDENTIFIED

APPRAISAL ACTION PLAN

AGREED OBJECTIVE AND DATE TO BE MET	SUCCESS CRITERIA	ACTIONS/INTERIM MILESTONES INC DATES	SOURCES OF EVIDENCE OF ACTIVITY AND OUTCOMES

SKILLS AND EXPECTATIONS
<i>Job and Professional Knowledge/Skills:</i> Developing and maintaining a high level of job and professional knowledge/skills and using these to provide an excellent service and achieve organisational objectives.
<i>Commitment and Motivation:</i> Taking personal responsibility for your own development, demonstrating self-motivation and commitment towards achieving results and applying yourself in a positive manner to the work of the organisation.
<i>Planning and Personal Organisation:</i> maximising efficiency, prioritising workload appropriately and focussing on the right areas to ensure the achievement of own/team and organisational objectives.
<i>Relationships with Colleagues:</i> Building and maintaining productive and harmonious working relationships within own team and across the wider organisation.
<i>Customer Focus:</i> Responding proactively to customers' needs, both internal and external, to ensure the delivery of high quality, efficient services.
<i>Communication:</i> Effectively communicating appropriate information through a range of mechanisms to ensure clarity and understanding and achieve organisational objectives.
<i>Problem Solving and Decision-Making:</i> Analysing problems and evaluating options and risks to identify most appropriate solutions and taking effective action through sound judgement.
<i>Team Working:</i> Working effectively with others within own team and across the wider organisation to achieve results in the job, team goals and organisational objectives.
<i>TA Standards:</i> All the standards have been met in lesson observations, learning walks and student outcomes.
Additional Skills and Expectations for Managers
<i>Managing Objectives:</i> Making the best possible use of your resources at work, prioritising appropriately, consulting with others and ensuring resources and efforts are focused on key organisational objectives and goals.
<i>Managing People:</i> Effectively leading and managing a team, dealing with team and individual problems, counselling and coaching others to achieve results and encouraging and supporting the team in their activities.

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PROFESSIONAL STANDARDS FOR TEACHING ASSISTANTS

Advice for headteachers, teachers, teaching assistants, governing boards and employers

June 2016



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Introduction

The Professional Standards for Teaching Assistants were originally drafted by a working group set up by the Department for Education (DfE) in conjunction with organisations representing the schools workforce, practitioners and others also committed to ensuring excellence in education. After completing the standards the government decided not to publish them and so a number of organisations interested in promoting the work of teaching assistants asked the DfE for permission to publish them. Permission was granted subject to it being made clear that the DfE was no longer involved in the production of the standards, which we are happy to do.

These teaching assistant standards are non-mandatory and non-statutory, but they sit alongside the statutory standards for teachers and headteachers and help to define the role and purpose of teaching assistants to ensure that schools can maximise the educational value and contribution of employees working directly with pupils. As such, we believe that they provide a valuable tool for the whole school team. We aim for these standards to benefit you, your colleagues and your pupils.

This document provides the standards themselves as well as supporting guidance detailing how the professional standards for teaching assistants should and should not be used. The standards should help teaching assistants and their colleagues in schools define and understand their role and are enhanced when underpinned by a professional approach from school leaders to employing and deploying teaching assistants to ensure that educational outcomes are raised.

Please note these standards will be most effectively used when read and implemented alongside the materials referenced in the 'Further Information' section on page 12.

These standards could not have been published without the hard work of the original review team. The details of the original review panel's remit and members can be found [here](#).

These standards are endorsed by UNISON, NAHT (National Association of Head Teachers), NET (National Education Trust), London Leadership Strategy and Maximising TAs, with involvement and support from Rob Webster (UCL Institute of Education), Paula Bosanquet (University of East London), Maria Constantinou, schools-based practitioner, and Dame Kate Dethridge NLE, Headteacher of Churchend Academy Teaching School (home of the Reading Teaching School Alliance) and former chair of the DfE working group that drafted the standards.

Who is this advice for?

This guidance is for:

- Teaching assistants, teachers and school leaders
- Governing boards and employers
- Local authority support services

These standards are applicable to all teaching assistants in schools, working at all levels. It is hoped these standards will support and shape positive conversations teaching assistants have with colleagues, managers and headteachers around their own roles and professional development.

Please note this advice and guidance refers to 'schools' throughout. This includes all schools whether funded via the local authority ('maintained schools' or voluntary aided schools) or via the Education Funding Agency (academy schools and free schools etc.).

Purpose of the standards

The *Professional Standards for Teaching Assistants (2016)* defines high standards which are applicable to all teaching assistant roles in a self-improving school system. The main purpose of these standards is to raise the status and professionalism of teaching assistants and to position their role within a community of professionals, including teachers and school leaders, all working together to improve outcomes for children.

The teaching assistants' standards were developed out of a review of the teachers' and headteachers' standards by independent groups. The publication of these standards recognises that existing standards for Higher Level Teaching Assistants (HLTAs) do not apply to all teaching assistants. These standards do not replace the professional standards for HLTAs; they are complimentary to them (see Further information).

National Occupational Standards for staff supporting teaching and learning provide a detailed framework for the training and development of support staff. They provide more detailed insights and guidance (see Further information).

This is a set of standards for teaching assistants that:

- are unequivocal, clear and easy to understand and use;
- can be used to inform performance management processes;
- steer the professional development of teaching assistants at all levels;
- are designed to inspire confidence in teaching assistants and ensure that schools use their skills and expertise to best effect;
- focus primarily on the key elements of their professional relationship with teachers to ensure that all pupils attain the highest possible standards.

Overview of roles

What is a teaching assistant?

A number of different job titles are used for staff supporting teaching and learning. This document refers to "teaching assistants" throughout and this includes staff based in the classroom for learning and pupil support, e.g. HLTAs, teaching assistants, special needs support staff, early years practitioners, minority ethnic pupils support staff and bilingual assistants. While most teaching assistants are employed directly by schools and academies, some are employed by local authority services and academy chains and work across a range of schools and settings.

The role of the teaching assistant

The primary role of the teaching assistant should be to work with teachers to raise the learning and attainment of pupils while also promoting their independence, self esteem and social inclusion. They give assistance to pupils so that they can access the curriculum, participate in learning and experience a sense of achievement.

Teaching assistants are an integral part of the school workforce representing a substantial investment of school funding. School leaders' decision-making about the effective deployment of teaching assistants is crucial in making a difference to pupil achievement (see Further information). Teaching assistants should act with honesty and integrity to uphold comparable standards to other education professionals, in order to make the education of pupils their first concern. By demonstrating values and behaviours consistent with their professional role, teaching assistants work with other education professionals within a common framework of expectations.

The role of school leaders

School leaders have a crucial role to play in the raising the status of teaching assistants. These standards provide school leaders with a tool to ensure consistency for all teaching assistants, so their skills and expertise in raising pupil achievement are recognised and developed.

Active and practical application of the standards demonstrates that school leaders recognise the value and importance of teaching assistants and should ensure teaching assistants have parity of esteem with fellow education professionals. However, it should be understood that adopting and using the standards in isolation is insufficient to the overall aim of delivering good outcomes for pupils.

These standards form an essential part of wider, complementary guidance to assist school leaders' strategic and operational decision-making, such as the *Making Best Use of Teaching Assistants* guidance report from the Education Endowment Foundation (EEF). This report sets out the best available evidence on the effective deployment of teaching assistants and recommendations on how best to utilise their skills, knowledge and expertise in schools.

The effective deployment of teaching assistants, and appropriate preparation for the tasks they undertake, is the key to their success in supporting teaching and learning. School leaders should not only ensure that teaching assistants have the right knowledge and skills to provide effective teacher and pupil support, via appropriate and timely training and professional development, but also ensure that teachers are informed and equipped to fully capitalise on teaching assistants' professional learning and expertise. School leaders and teachers should work to the principle that teaching assistants should be deployed in ways that add value to what teachers do, not replace them.

Meeting these standards depends on school leaders being able to provide a climate that supports forms of collaborative working that do not burden teachers or teaching assistants; and recognising that many teaching assistants manage other staff and require the time to do this effectively. Teaching assistants require support and opportunities to reflect on their own practice in order to identify their training needs. Teaching assistants should have an appropriate career development pathway and access to training within the working day.

The four themes

The *Professional Standards for Teaching Assistants* are set out in four themes.

1. Personal and professional conduct

2. Knowledge and understanding

3. Teaching and learning

4. Working with others

Within each theme there are several standards expected of teaching assistants.

Why were these themes chosen?

Personal and professional conduct – In order for teaching assistants to provide effective support to teachers and pupils, they need to be clear about their role and responsibilities and how these fit within the wider structure of the school. In the same way as teachers, teaching assistants operate in a position of trust and are seen by pupils as role models. They should be able to maintain proper boundaries with pupils and their behaviours should reflect this responsible position.

Knowledge and understanding – Teaching assistants should have sufficient knowledge and skills to help teachers support pupils in achieving their maximum potential. School leaders are best placed to make judgements about the type and level of knowledge and skills that individual teaching assistants need, as this will vary according to job role. This could include: subject knowledge; specialist skills and

knowledge to support pupils with special educational needs or disabilities; knowledge of the curriculum; pedagogical knowledge; behaviour management strategies.

Teaching and learning – An important role of a teaching assistant is to support the teacher in ensuring the best possible outcomes for all pupils. The standards in this theme recognise that teaching assistants work under the supervision of a teacher in accordance with arrangements made by the headteacher of the school. Schools should refer to the EEF guidance report (see Further information) for 'relevant strategies to support the work of the teacher'.

Working with others – Teaching assistants work with other professionals, parents, carers and outside agencies as well as with pupils themselves. Although other themes require teaching assistants to work collaboratively with others, these qualities and skills were considered so important and distinctive to the role as to merit their own theme.

Personal and professional conduct

Teaching assistants should uphold public trust in the education profession by:

- **Having proper and professional regard for the ethos, policies and practices of the school** in which they work as professional members of staff.
- **Demonstrating positive attitudes, values and behaviours** to develop and sustain effective relationships with the school community.
- **Having regard for the need to safeguard pupils' well-being** by following relevant statutory guidance along with school policies and practice.
- **Upholding values consistent with those required from teachers** by respecting individual differences and cultural diversity.
- **Committing to improve their own practice** through self-evaluation and awareness.

Knowledge and understanding

Teaching assistants are expected to:

- **Share responsibility for ensuring that their own knowledge and understanding is relevant and up to date** by reflecting on their own practice, liaising with school leaders, and identifying relevant professional development to improve personal effectiveness.
- **Take opportunities to acquire the appropriate skills, qualifications, and/or experience** required for the teaching assistant role, with support from the school/employer.
- **Demonstrate expertise and skills in understanding the needs of all pupils** (including specialist expertise as appropriate) and know how to contribute effectively to the adaptation and delivery of support to meet individual needs.
- **Demonstrate a level of subject and curriculum knowledge** relevant to their role and apply this effectively in supporting teachers and pupils.

- **Understand their roles and responsibilities within the classroom and whole school context recognising** that these may extend beyond a direct support role.

Teaching and learning

Teaching assistants are expected to:

- **Demonstrate an informed and efficient approach to teaching and learning** by adopting relevant strategies to support the work of the teacher and increase achievement of all pupils including, where appropriate, those with special educational needs and disabilities.
- **Promote, support and facilitate inclusion** by encouraging participation of all pupils in learning and extracurricular activities.
- **Use effective behaviour management strategies consistently** in line with the school's policy and procedures.
- **Contribute to effective assessment and planning** by supporting the monitoring, recording and reporting of pupil performance and progress as appropriate to the level of the role.
- **Communicate effectively and sensitively with pupils** to adapt to their needs and support their learning.
- **Maintain a stimulating and safe learning environment** by organising and managing physical teaching space and resources.

Working with others

Teaching assistants are expected to:

- **Recognise and respect the role and contribution of other professionals, parents and carers** by liaising effectively and working in partnership with them.
- **With the class teacher, keep other professionals accurately informed** of performance and progress or concerns they may have about the pupils they work with.
- **Understand their responsibility to share knowledge** to inform planning and decision making.
- **Understand their role** in order to be able to work collaboratively with classroom teachers and other colleagues, including specialist advisory teachers.
- **Communicate their knowledge and understanding of pupils** to other school staff and education, health and social care professionals, so that informed decision making can take place on intervention and provision.

Supporting guidance

Who are the standards for?

The standards are a tool for teaching assistants and for teachers and members of a school leadership team responsible for managing their work. They are also intended to help employers and governors when recruiting support staff, and defining the job roles of teaching assistants. They may also be useful to local authority support services and multi academy trusts which employ teaching assistants. They are core standards for all teaching assistants working across all phases in mainstream and specialist settings.

What are the standards for?

These core standards are intended to raise the status and professionalism of teaching assistants. They define characteristics that all teaching assistants can demonstrate regardless of their working context. The standards are designed to ensure that the skills and experience demonstrated by teaching assistants help to support high-quality teaching, learning and social inclusion.

The standards have been written to reflect the diversity of school employers and the wide-ranging responsibilities of teaching assistants working with pupils and teachers in a variety of contexts. They are designed for all teaching assistants and for schools to adapt to their own context.

The standards are complementary to the existing standards for Higher Level Teaching Assistants (see Further information), rather than a replacement for them. The standards provide clear and concise expectations for all teaching assistants, working at all levels, and a framework to strengthen their status as education professionals.

The standards may be used as a tool to support the performance management of teaching assistants, although employers are free to decide the standards against which teaching assistants are assessed.

What are the standards not for?

Whilst the standards may be used in support of any recruitment exercise, they should not be used as a checklist. The standards are not appropriate for job evaluation; instead the role profiles developed by the National Joint Council for Local Government Services role profiles can be used (see Further information).

The standards are generic and broad based – they do not specify requirements for staff recruited to specialist roles.

The standards should be considered as a whole. Although some standards may be more important in some contexts, the professionalism and contribution of teaching assistants needs to be recognised in its entirety rather than under specific themes. The weight given to each element will vary from school to school and will depend on the individual job role and responsibilities.

Using the standards

The standards can be used:

- **For teaching assistants, to shape their own practice and professional development, within and beyond the school**

Self-evaluation in a supportive context is key to the development of all education professionals. These standards can be used by teaching assistants as a focus for reflection on their own practice.

Teaching assistants can use the standards to have a constructive conversation with headteachers, teachers and others about areas where support is needed for professional development. Teaching assistants should feel empowered to seek such support. School leaders are expected to provide such training and support as may be necessary for the support staff in their schools, as possible within the financial constraints in which they operate.

- **For teachers or other line managers, to inform the appraisal of teaching assistants**

There is no mandatory requirement to use the standards for this purpose, but they provide a useful framework for appraisal discussions. These standards should not be used as prescribed objectives.

Objectives must be relevant to the context of the individual school and teaching assistant.

They may be used to support and supplement existing appraisal frameworks, but are not designed as a sole tool for performance management.

The standards should not be used to assess the performance of teaching assistants in the way that teachers' performance is assessed. The standards are not part of a statutory framework and teaching assistants do not have the same sort of pay and career structure as teachers. The standards should not be used for the purposes of accountability. Teaching assistants should not be expected to provide evidence against each of the standards for appraisal

- **For employers to support the recruitment and appointment of teaching assistants**

The standards are not an off-the-shelf job description or a person specification, but they can be used to underpin and shape both of these documents.

It is important to focus on the context of the individual school. Different schools and teaching assistants within each school will have different levels of responsibility and so require different skills and experience.

- **For employers to evaluate their induction arrangements and provision of continuous professional development (CPD) for teaching assistants**

The standards should inform schools' processes for identifying training and development needs. Schools need to have CPD policies which effectively address the needs of the whole workforce and should use their own and external training budgets to this end.

Further information

Teaching assistant deployment

Education Endowment Foundation Guidance report: Making effective use of teaching assistants

Department for Education Effective deployment of classroom staff

Education Endowment Foundation Teaching and learning toolkit

Ofsted Deployment and impact of support staff (from 2010, not linked to current inspection framework)

Maximising TAs

Existing standards for teaching assistants

HLTA standards

National Occupational Standards

Teaching assistants – careers, training and development

Skills for schools

NJC job profiles

NJC model role profiles

Teachers' and headteachers' standards

Teachers' Standards

Headteachers' Standards

Other resources

Statutory policies for schools

Keeping children safe in education

SEND Code of Practice

Professional development standards for teachers (to be published 2016)

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Lesson observation forms and feedback

Name of Teaching Assistant observed:

Name of observer(s):

Date of observation:

GUIDANCE FOR OBSERVER:

Personal and Professional Conduct

1. Having proper and professional regard for the ethos, policies and practises of Ash Manor School.
2. Demonstrating positive attitudes, values and behaviours to develop and sustain effective relationships with the school community.
3. Having regard for the need to safeguard pupils' well-being by following relevant statutory guidance along with school policies and practice.
4. Upholding values consistent with those required from teachers by respecting individual differences and cultural diversity.
5. Committing to improve their own practice through self-evaluation and awareness.

Knowledge and Understanding

1. Acquire the appropriate skills, qualifications, and/or experience required for the teaching assistants role, with support from the school employer.
2. Demonstrate expertise and skills in understanding the needs of all pupils (including specialist expertise as appropriate) and know how to adapt and deliver support to meet individual needs.
3. Share responsibility for ensuring that their own knowledge and understanding is relevant and up to date by reflecting on their own practice, liaising with school leaders and accessing relevant professional development to improve personal effectiveness.
4. Demonstrate a level of subject knowledge and curriculum knowledge relevant to their role and apply this effectively in supporting teachers and pupils.
5. Understand their roles and responsibilities within the classroom and whole school context recognising that these may extend beyond a direct support role.

Teaching and Learning

1. Demonstrate an informed and efficient approach to teaching and learning by adopting relevant strategies to support the work of the teacher and increase achievement of all pupils including, where appropriate, those with special educational needs and disabilities.
2. Promote, support and facilitate inclusion by encouraging participation of all pupils in learning and extracurricular activities.
3. Use effective behaviour management strategies consistently in line with school policy and procedures.
4. Contribute to effective assessment and planning by supporting the monitoring, recording and reporting of pupil progress as appropriate to the level of the role.
5. Communicate effectively and sensitively with pupils to adapt to their needs and support their learning.
6. Maintain a stimulating and safe learning environment by organising and managing physical teaching space and resources.

Working with Others

1. Recognise and respect the role and contribution of other professionals, parents and carers by liaising effectively and working in partnership with them.
2. With the class teacher, keep other professionals accurately informed of progress or concerns they may have about pupils they work with.
3. Understand their responsibility to share knowledge to inform planning and decision making.
4. Understand their role in order to be able to work collaboratively with classroom teachers and other colleagues, including specialist advisory teachers.
5. Communicate their knowledge and understanding of pupils to other school staff and education, health and social care professionals, so that informed decision making can take place on intervention and provision.

OBSERVER FEEDBACK 2019 – 2020 – TO BE COMPLETED DURING FEEDBACK MEETING

Observer feedback:		
Agreed areas of expertise worthy of wider dissemination (Observer/teaching assistant):		
1.		
2.		
3.		
I, the teaching assistant, agree to any identified areas of expertise being shared within the school		
YES/NO		
Agreed areas of development (Observer/Teaching Assistant):		
1.		
2.		
3.		
Date:	Teaching Assistant Signature:	Observer signature:

TEACHING ASSISTANT SELF EVALUATION

(THIS COMPLETED FORM SHOULD BE TAKEN TO THE FEEDBACK MEETING)

Does the evidence from the lesson and workbooks support the meeting of "Teaching Assistant standards"?

Lesson meets minimum expectations	Adopt relevant strategies to support the work of the teacher and increase student progress.	Promote and facilitate inclusion by encouraging student participation in learning	Use effective behaviour management strategies consistently in line with school policy	Contribute to effective assessment and planning (monitoring, recording and reporting pupil progress)	Communicate effectively and sensitively with pupils to adapt to their needs and support their learning	Demonstrate a level of subject knowledge and apply this effectively to support the students learning and progress.	Know and adapt resources to meet individual needs.	Work collaboratively with the classroom teacher to plan effective lessons.
Tick if you think standard has been met								

Teaching Assistant self-evaluation *(prepared by teaching assistant prior to the feedback meeting)*:

ACTIONS TAKEN IN RESPONSE TO FEEDBACK FROM LESSON OBSERVATION

Name:

Observer:

Observation Date:

Actions undertaken in response to feedback from observation and evaluation of impact of actions:

LEARNING WALK PROFORMA

Date of learning walk:	Class:	Room:	Period:
TA:	Subject:	Observer(s):	Teacher supporting:
EHCP/ S: K:	WWW		EBI
Adopt relevant strategies to support the work of the teacher and increase student progress.			
Promote and facilitate inclusion by encouraging student participation in learning			
Use effective behaviour management strategies consistently in line with school policy			
Contribute to effective assessment and planning (monitoring, recording and reporting pupil progress)			
Communicate effectively and sensitively with pupils to adapt to their needs and support their learning			
Demonstrate a level of subject knowledge and apply this effectively to support the students learning and progress.			
Know and adapt resources to meet individual needs.			
Work collaboratively with the classroom teacher to plan effective lessons.			
Additional Comments			
Action			

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CONFIDENTIAL (when completed)



Trafalgar
S c h o o l

Learning today, leading tomorrow

APPRAISAL OBJECTIVES 2020-21

Appraisee: _____

Appraiser: _____

Date: _____

Once complete, please photocopy this form. One copy to be kept by the Appraisee, one copy to be kept by the Appraiser and a copy to be passed to ARA for the personnel file.

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CONFIDENTIAL (when completed)

AGREED APPRAISAL OBJECTIVES

Objectives for the next cycle including any relevant whole school/team objectives:

Objective	Reference to Teaching Assistant Standards	Reference to TS SIP
Student Outcomes All students supported by a TA make good or outstanding progress from their starting points.		
Training/Developmental/Support needs:		
Quality Assured: (CCO/ARA) Signed: _____ Date: _____		

APPRAISAL MANAGEMENT PLANNING RECORD

Agreed objective and due date to be met	Success Criteria	Actions and interim milestones incl dates	Sources of evidence of activity, outcomes and impact

PROFESSIONAL LEARNING AND DEVELOPMENT LOG

Professional Learning	Date	Impact of CPD on practice

Professional Learning	Date	Impact of CPD on practice

**INTERIM APPRAISAL REVIEW MEETING
2020-2021**

Appraisee: _____

Date: _____

Appraiser: _____

Objectives	Progress made towards success criteria	Evidence gathered (i.e. lesson observations, data, minutes, CPD)	Actions needed to meet objectives
Student Outcomes			

Objectives	Progress made towards success criteria	Evidence gathered (i.e. lesson observations, data, minutes, CPD)	Actions needed to meet objectives

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