

Performance Appraisal Policy

INTRODUCTION

Managing performance is an integral part of the career of every successful employee and organization serving to direct employee work contributions and staff development. The primary objective of this policy is to ensure all our employees are working towards one common goal and objective, reinforcing the company values.

The job performance of every employee shall be evaluated periodically by the employee's immediate manager. Conducting appraisal meetings allows an employee and the line manager to discuss performance in a constructive manner, identify training and development needs and to reflect on career outlook.

PRINCIPLES

In line with the values of the company, fairness and equality will be the guiding principles of the appraisal process. No employee will be given special privileges based on age, disability, gender, race, religion/belief or any other grounds.

Regular feedback on performance is an integral part of the process and ensures employees understand what is expected of them and how they are performing against objectives set and requirements of the role. Regular feedback can be in the form of one-to-one meetings, team meetings etc. Feedback can also be sourced from peers, subordinates (where applicable) or external clients for those client facing staff.

SCOPE

This policy and process applies to all staff in the organization in any employment capacity.

APPRAISAL PERIOD

The appraisal period will run from 1st September to August 31st and the HR department will communicate dates which may vary for teaching and support staff.

1. Start

- 1.1. Objectives and competencies need to be set and completed by September 30 of the start of each year.

2. Mid Year

- 2.1. Every employee needs to have at least one appraisal discussion per year and a mid-year review is recommended.

3. End of Year

- 3.1. End of year or final annual appraisal discussions will be held at beginning of July after students finish the school year.

PROCESS

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1. Setting Goals and Objectives

- 1.1. The process should clearly articulate personal and organizational objectives so that employees are able to fulfill their potential and contribute to the school's success.
- 1.2. Employees are encouraged to think of 3 - 5 SMART goals and objectives that they would like to incorporate into the Performance Appraisal (PA) form. A weightage/percentage needs to be given to each objective to the sum of 100%.
- 1.3. Goals and objectives need to be **Specific, Measurable, Achievable, Relevant** and **Time bound**.
- 1.4. As part of the school-wide approach to improve ways of working, each employee will need to focus on 2 of the core competencies. These competencies will be chosen based on the job description and job nature. A weightage/percentage needs to be given to each competency to a sum of 100%. Please refer to the Competency Framework for definitions and levels.
- 1.5. The goals and objectives, along with behavioral competencies and development needs will be discussed with the Line Manager and need to link back to the strategic goals of the school. The evaluation of performance shall be completed at the end of the calendar year.
- 1.6. Employees are also encouraged to think objectives and competencies they would like to develop as part of their personal and professional development. These need to be assigned and agreed upon during the first appraisal meeting.
- 1.7. A signed copy of the appraisal form will remain with the employee, line manager and Human Resources. This form is confidential and will be maintained as such.

2. Review and Provide Feedback

- 2.1. It is recommended that an appraisal happens at least twice a year: once after 6 months of setting goals and objectives and once at the annual performance appraisal meeting wherein a score is tabulated.
- 2.2. In the event that the line manager and employee don't agree on the rating, HR can assist in mediating.
- 2.3. Employees are encouraged to keep a record of achievements and development activities throughout the year in preparation for annual performance appraisal.
- 2.4. The focus of the review is on the totality of performance and how to further improve performance and effectiveness.
- 2.5. Meetings are an opportunity for employee and manager to have positive and honest discussions however it is also an opportunity to discuss poor performance and unacceptable behaviors.
- 2.6. Any poor performance discussions should be documented through the Performance Improvement Plan of the Disciplinary and Capability Policy rather than the Appraisal Policy.

3. Post Appraisal

- 3.1. HR will evaluate the results of each school Performance Appraisal process. In the event that results are skewed, these will be forced to a standard normal distribution.
- 3.2. A performance appraisal does not always result in an automatic salary increment. Any payouts are dependent on school performance, individual performance and on Board of Director's approval.

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4. Development

- 4.1. In line with the school culture, we encourage all our employees to take responsibility for their own development.

APPRAISAL RATINGS

The Performance Appraisal system relies on 5-point rating as follows:

Rating	Name	Definition
5	Outstanding Performance Expectations	Exceptional contributor to the success of SAIS, demonstrates role model behavior and frequently persuade audiences to act and bring change across schools and not in silos. This rating also indicates work that had a far-reaching impact in moving the school ahead on a significant goal.
4	Exceeding Performance Expectations	Strong contributor to the success of SAIS, quality of performance exceeds the expectation of SAIS and to be able to bring change to individuals or within the school they work in and not in silos.
3	Meets Expectations	Good contributor to the success of SAIS. Quality of performance meets the expectation of SAIS. Typically, this is the expected standard from employees.
2	Below Expectations	This rating is for employees who are inconsistent in meeting job expectations, quality of performance is below the expectation of SAIS. Additional training, coaching, significant improvement, and feedback in critical areas of the expected job results or behavioral competencies.
1	Unsatisfactory	Overall poor performance and employee should be on a Performance Improvement Plan due to poor quality of work or poor attainment in behavioral competencies.

1. The individual score of each goal needs to be tabulated by multiplying the line manager and employee agreed score with the weight of the goal.
2. The individual score of each competency needs to be tabulated by multiplying the line manager and employee agreed score with the weight of the competency.
3. Objectives are weighted at 70% of the total appraisal score and competencies at 30%.
4. To calculate the total and final score: objectives rating multiplied by 70% and competencies rating multiplied by 30% are added together.
5. For academic staff, feedback from teaching/classroom observations may be used in the appraisal.

SPECIAL CONSIDERATIONS

1. Job changes

Employees that are promoted or transferred to another role during the academic year will have the following considerations:

- 1.1. If the period spent in the new position is less than 3 months at the time of the annual appraisal, the previous line manager will be responsible for employee's performance evaluation.

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- 1.2. If the period spent in the new position is from 3 to 6 months at the time of the annual appraisal, there should be a combined evaluation from both line managers; previous and new one. The final evaluation shall be jointly agreed by both line managers.
- 1.3. If the period spent in the new position is more than 6 months at the time of annual appraisal, then the new line manager will be completely responsible for evaluating the employee.

2. Academic staff

- 2.1. Feedback from teaching/classroom observations (whether formal or 'drop in'/information) will be used in the appraisal. All observations shall be approached in a supportive and positive manner.
- 2.2. In the interest of fairness, teachers with similar roles and responsibilities may have objectives that are the same or similar. Draft PA forms will be moderated by respective school principal and HR to ensure that the objectives are appropriate, consistent amongst teachers and contribute to improvement of the school outcomes and student attainment.
- 2.3. Teacher objectives will be linked to the relevant Teacher standards of the governing body and in line with the school priorities for teaching and learning.
- 2.4. SAIS encourages professional development in line with the teacher needs and school and governing body requirements.

The HR Department has the right to modify or change this policy at any time.