



# **PONTEFRACT**

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## ACADEMIES TRUST

### **PERFORMANCE MANAGEMENT POLICY**

#### **ALL STAFF**

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# 1. Introduction and Scope

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## 1.0 INTRODUCTION AND SCOPE

- 1.01 The Pontefract Academies Trust (“The Trust”) is committed to giving all employees the support and encouragement they need to raise aspirations, unlock potential and work to achieve excellence through encouraging a “can do” culture, across all areas of the Trust.
- 1.02 This performance management framework, (the appraisal process) applies to all eligible staff and is intended to facilitate and support a continuous development and improvement process for all groups of staff.
- 1.03 The Trust believe that an effective appraisal process is a framework to support improvements, support employee’s performance and development and recognises the important role played by leaders and managers, in the appraisal process.
- 1.04 This policy and associated procedures form part of the Pontefract Academies Trust Performance Management Framework and provide a structured and consistent approach to ensuring continuous employee development and a means of dealing with the minority of employees whose performance does not meet with required standards.
- 1.05 This performance management policy will:
- be integral to our culture;
  - include a commitment by all to raising standards;
  - provide opportunities for continuous professional development;
  - involve all staff in departmental and pastoral planning and thus enhance the on-going sharing of good practice;
  - be consistent, equitable and fair;
  - be manageable;
- 1.06 The aims of the performance management and appraisal process is to:
- provide an opportunity for two-way feedback in relation to performance discussions between Managers and employees;
  - to discuss how the individual or team is progressing in terms of the achievement of objectives and targets;
  - to see what improvements can be made, to build on their strengths and to identify training and development opportunities to enable them to perform their job effectively in the context of the Trust and academy objectives;
  - It is also an opportunity for employees to provide feedback to their line manager about how they are managed.
- 1.07 This policy sets out where staff are eligible for pay progression.

# 1. Introduction and Scope

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## 1.1 SCOPE

- 1.1.1 Pontefract Academies Trust is committed to ensuring consistency of treatment and fairness in the operation of performance management. This policy sets out the framework of a clear and consistent assessment of the overall performance of staff within the Trust's plans for improving educational provision and performance. It underlines the standards expected of teachers, and other professionals, and provides a framework for supporting individual development needs and career progression, within the context of Academy improvement plans and professional needs.
- 1.1.2 The policy applies to all staff employed by the Trust, except for:
- Teachers contracted for less than four months
  - Staff who are within their probationary period
  - NQT's - specific guidance is in place for newly qualified teachers (NQT's) undertaking their induction period.
- 1.1.3 The planning and review process will be a supportive and developmental process, designed to foster professional dialogue between colleagues and ensure that all staff have the skills and support they need to carry out their role successfully. It will help to provide clarity around what is expected of them in their role and ensure that employees are pro-active in continuing to improve their professional practice.
- 1.1.4 This policy sets out the formal performance management process, however all staff should strive to improve their performance and to maximise their potential. All staff are expected to work towards improving their individual performance, the work of their team and their contribution to the Academy's overall performance. Leaders and Managers will support and encourage them in doing so throughout the year.
- 1.1.5 The assessment of performance throughout the cycle will be made against the performance criteria agreed. This will be the basis on which pay recommendations are made by the reviewer. Each Manager is expected to exercise professional judgement within this policy. It is intended that the performance management process will inform each Academy's self-evaluation and improvement planning processes. Similarly, the Academy (or Trust) Improvement Plan will inform the objectives set through the performance management process.
- 1.1.6 Where there is evidence that leads to concern that an employee is consistently failing to reach professionally acceptable standards through lack of capability, then the Capability Policy should be followed.

# 1. Introduction and Scope

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- 1.1.7 Misconduct, wilfully deficient performance, refusal to follow instructions, negligence and other similar situations should be dealt with under the Trust's Disciplinary policy. Where ill-health or other health issues are identified as a contributor to under performance, the matter should be dealt with under the Sickness Absence Management procedures.
- 1.1.8 The term 'line manager' has been used throughout this policy, this term can be interchanged with 'reviewer' or 'appraiser' or 'Manager'.

## 2. Roles and Responsibilities

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### 2.0 ROLES AND RESPONSIBILITIES

#### 2.1 CEO/EXECUTIVE DIRECTOR/HEADTEACHER/HEAD OF SCHOOL/NOMINATED MANAGER RESPONSIBILITIES

- 2.1.1 The CEO has the responsibility to ensure that this policy is applied fairly and consistently across the Trust. The CEO will be made aware of any employees whose performance is likely to impact their pay progression. Throughout this procedure, the term “Line Manager” will refer to the CEO/Executive Director/Executive Headteacher/Head of School or nominated manager with the delegated authority to take action.
- 2.1.1 In the case of an Executive Director/Executive Headteacher/Head of School, the CEO will take the role of line manager, and for the CEO a nominated Director will take the role of line manager. The CEO/Executive Director/Executive Headteacher/Head of School has the right to delegate responsibilities to appropriate leaders or managers, to act as ‘line manager’.
- 2.1.2 The Head of School, with the assistance of other Senior Leader colleagues, will review performance management records and related information, including the effectiveness of this policy, and where required, report to the School Governance Committee. Each Head of School and the CEO will be made aware of pay decisions and recommendations that may have been made through this process.
- 2.1.3 The Executive Director/Executive Headteacher/Head of School is responsible for ensuring appropriate quality assurance systems and practices are in place in their Academy and communicating these to their staff. The Head of School will provide the Trust Board and School Governance Committee with an annual written report on the operation of the Performance Management Policy in their Academy.

#### 2.2 EMPLOYEE RESPONSIBILITIES

- 2.2.1 All employees should focus their efforts, skills and knowledge to undertake their role to the best of their ability. All staff are expected to access a range of support provided, as detailed in the CPD policy.
- 2.2.2 Within each Academy there will be a nominated administrator/officer who is responsible for coordinating performance management processes and administering any payroll changes.

#### 2.3 HUMAN RESOURCES MANAGER/ADVISOR ROLE

- 2.3.1 The Human Resources Manager will provide advice and assistance to Managers regarding the operation of this procedure. Where requested, the HR Manager will ensure there is training provision for this area of people management.

## 2. Roles and Responsibilities

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### 2.4 CONFIDENTIALITY

2.4.1 A degree of confidentiality must be maintained by all parties, particularly in discussing performance management outcomes.

### 2.5 RECORDS

2.5.1 Performance Management records will be stored in the employee's personnel file for two years.

## 3. Performance Management Cycle

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### 3.0 PERFORMANCE MANAGEMENT CYCLE

- 3.1. Performance management should be a regular cycle of 'plan', 'do' and 'review', and performance of all staff must be formally reviewed on an annual basis.
- 3.2. Performance planning for the forthcoming academic year, and reviews of performance during the last academic year, should be completed for all by 31st October, and for the CEO/Executive Director/Executive Headteacher/Head of School by 30th September, at the latest.
- 3.3. Performance management objectives will be set for each academic year. Objective setting meetings need to be held by 31st October annually, with completed and signed paperwork submitted by 30th November. This should be submitted to the nominated officer in each Academy. Where paperwork is not submitted within these timeframes it could impact any pay progression/payroll administration.
- 3.4. Teachers who are employed during the performance management cycle will have objectives set from their first date of employment to the end of their fixed term contract, or to the end of the performance management year, whichever is sooner.
- 3.5. Support staff who complete their probationary period during the performance management cycle will have objectives set from the date they complete their probation to the end of their fixed term contract, or to the end of the performance management year, whichever is sooner.
- 3.6. Where Academy data for the preceding academic year has not yet been verified, provisional objectives may be set for CEO/Executive Director/Executive Headteacher/Head of School and should be finalised and confirmed as soon as possible.
- 3.7. Standard templates for Teaching and Support staff should be used to set and review performance objectives. Individuals are expected to have a maximum of three objectives per cycle.
- 3.8. Between February – April annually Managers should undertake an 'Interim Performance Management review'. This is scheduled review intended to ensure that staff remain on track to meet their objectives and that appropriate support and development is being provided. Standard templates should be used to record the interim review. It is expected that Managers highlight to employees and Heads of School where an employee is at risk of not meeting their objectives by the end of the review cycle.
- 3.9. Throughout the performance management year there should be a series of regular discussions around performance, feedback from quality assurance processes and professional development. All of these discussions contribute to, and support, the performance management cycle.



## 4. Planning, Review and Pay Progression

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### 4.0 PLANNING, REVIEW AND PAY PROGRESSION

#### 4.1 APPOINTING REVIEWERS

- 4.1.1 The Head of School/Senior leaders will agree annually who is responsible for performance management reviews/planning. Relevant line managers, or middle leaders may be delegated this role.
- 4.1.2 Each employee will have a designated reviewer. Where possible, the performance review and person setting and agreeing objectives will be the same. This may not always be possible.
- 4.1.3 Where an employee has more than one line manager the Head of School will determine which line manager will be best placed to manage and review the individual's performance and advise the reviewee of this. In this instance, the 'lead' line manager should seek input from the other line managers when setting objectives, development planning, and conducting the end of year review.
- 4.1.4 If circumstances arise in which, for professional reasons, a member of staff wishes to request a change of reviewer, they may submit a written request to the Head of School for that reviewer to be replaced, stating the reasons. Where the request is not accepted, the reasons for the refusal should be explained in writing.

#### 4.2 PLANNING PROCESS (SETTING OBJECTIVES)

- 4.2.1 Performance management will be robust and vigorous. Objectives will be set before or as soon as practicable after, the start of each performance management cycle.
- 4.2.2 Each Academy is responsible for setting the performance criteria for its staff within the broad framework set out below:
- Teachers' Standards
  - Objectives
  - Professional Development
- 4.2.3 The objectives set will be Specific, Measurable, Achievable, Realistic and Time-bound. (SMART). They will be appropriate to the employee's role, seniority and level of experience. They will also take into account any professional aspirations or development.
- 4.2.4 All the objectives set will be linked to Trust/Academy and department (or team) improvement plans.
- 4.2.5 All the objectives set will, if achieved contribute to improving student outcomes (academic and pastoral), education provision, reputation, education support and overall Academy performance.

## 4. Planning, Review and Pay Progression

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4.2.6 All teachers, excluding the Executive Director/Executive Headteacher/Head of School, will generally have no more than three objectives. These may include, but are not limited to:

- Quality of teaching & learning (e.g. improving quality of planning/preparation/assessment; to demonstrate consistently “good” or better teaching & learning).
- Overall pupil/student progress (e.g. attainment, attendance, behaviour; either individual objectives, or contribution to the Academy and Trust or department targets).
- Contribution to wider academy/Trust life, implementing policy/practice (e.g. research and share ideas on wider ranges of approaches to assess education, successfully lead literacy strategies; support monitoring of SEND children).
- Leadership/management if applicable (e.g. if the individual has a TLR, they should have an objective linked to that area of work; or an objective linked to working with or developing other classroom staff).

4.2.7 The line manager and individual will seek to agree the objectives, but, if that is not possible, the line manager will determine the objectives.

4.2.8 For teaching staff, objective setting for teachers will refer to the standards against which teacher’s performance in that appraisal period will be assessed. These are the national Teacher’s Standards introduced by the Department of Education from September 2012.

4.2.9 There are no such national standards in place for support staff, but objective setting for support staff will refer to key points in their individual job descriptions.

4.2.10 Objectives will be recorded on the individual’s planning and review statement.

4.2.11 Performance management objective setting statements need to be completed, signed and submitted to HR by 30th November annually, or within two months of starting a new role/employees start date. There is shared responsibility with line managers and employees to submit this paperwork on time. Where staff do not submit paperwork by these deadlines then this may impact on the individual’s pay progression.

### 4.3 REVIEWING PERFORMANCE DURING THE YEAR

4.3.1 Evaluation of performance should be holistic, and evidence can come from a number of sources during the course of the year. Generally, this will have been agreed by the reviewee and the reviewer at the planning and review meeting to review progress over time and may include, but is not limited to:

- Classroom observations – See **Appendix A**.
- Task observations relevant to the objective (e.g. leading a meeting or inset day).
- Work sampling (review of lesson / subject planning records / marking & feedback).

## 4. Planning, Review and Pay Progression

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- Outcomes (pupil / student progress over time, attainment, behaviour, attendance, engagement).
- If directly relevant to the agreed objective and included as an agreed measure, feedback from pupils/student and/or parents (e.g. if a senior leader has an objective to organise parents' evenings).

### 4.3.2 Feedback

Individuals will receive constructive feedback on their performance throughout the performance year, and as soon as practicable after a classroom observation has taken place, or when other information/evidence has come to light. (For example, after a data assessment point, work scrutiny or completion of a project).

### 4.3.3 Interim reviews

4.3.3.1 Performance and development priorities should be reviewed and addressed on a regular basis throughout the year in interim meetings which take place at least twice a year (including the annual assessment).

4.3.3.2 Line managers will make comments, challenge, support and provide regular constructive feedback on an individual's performance throughout the performance management cycle.

### 4.3.4 Where concerns arise

4.3.4.1 Managers will make comments, challenge, support and provide constructive feedback on an individual's performance through providing regular feedback and support. Feedback will highlight any areas of strength as well as areas for development. Where there are concerns about any aspect of an individual's performance the line manager will meet the individual to:

- give clear feedback to the individual about the nature and seriousness of the concerns.
- give the individual the opportunity to comment and discuss the concerns.
- agree any support (e.g. coaching, mentoring, structured observations), that will be provided to help address the concerns.
- make clear how, by who and by when, progress will be reviewed.
- explain the implications and next steps, if no – or insufficient – improvement is made.

4.3.4.2 This discussion is a management meeting within the performance management framework and is not considered to be a formal meeting where the right of representation is offered. Notes should be taken at this meeting for the benefit of both parties, and to record the key points and actions agreed.

## 4. Planning, Review and Pay Progression

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### 4.4 TRANSITION TO CAPABILITY PROCEDURES

4.4.1 In a minority of cases, the line manager will be unsatisfied with the progress made towards the identified improvements. In this case, the individual will be advised in writing that the performance management procedures will no longer apply and that their performance will be managed under the Trust's capability procedures.

### 4.5 SUPPORT AND TRAINING

4.5.1 Performance management is intended to be a supportive process which will be used to inform continuous professional development. The Trust aims to foster a culture in which all staff take responsibility for improving their performance through appropriate professional development.

4.5.2 Equally it is the responsibility of the individual to focus their efforts, skills and knowledge to undertake their role to the best of their ability and all staff are expected to access a range of support provided. This is detailed in the CPD policy.

4.5.3 Professional development will be linked to improvement plans and ongoing individual professional development needs and priorities. Throughout the performance management cycle and performance discussions, both the employee and line manager should be discussing access to appropriate training, support or other CPD.

### 4.6 REVIEWING PERFORMANCE AT THE END OF THE YEAR

4.6.1 At the end of the performance management cycle, the reviewer and reviewee should review performance against the objectives agreed at the start of the cycle. The record of this review is within the planning and review templates.

4.6.2 The reviewer and reviewee will meet to discuss the performance review and record the outcomes of the meeting and discussion on the individual's planning and review statement. Individuals are encouraged to provide any evidence which will exemplify their performance against their objectives and the Teachers' Standards.

4.6.3 The review discussion will be open and two-way, focused on seeking to achieve a shared understanding of progress towards meeting the performance criteria and exploring any issues that may have impeded progress. The reviewer and reviewee should seek to agree an overall assessment of performance, and record this in the review statement. Within the record of the discussion should be:

- details of the individual's objectives for the period in question.
- an assessment of the individual's performance in their role against the objectives, their responsibilities and Teachers' Standards.

## 4. Planning, Review and Pay Progression

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- an assessment of the individual's training and development needs and any actions that should be taken to address them.
- an assessment of any improvement in the individual's performance (or capability) following the completion of a formal support programme. (Where the individual has had information, in writing, about performance concerns).
- a recommendation on pay progression (where relevant).

4.6.4 As objectives set should be achievable, the expectation is that all objectives will be met unless there are strong and well evidenced mitigating reasons as to why this has not been possible. However, recognising that objectives should be stretching, if good progress towards the achievement of a particularly challenging objective has been made, even if the performance criteria have not been met in full, this may be assessed favourably.

4.6.5 If an individual is within an ongoing formal programme of support at the end of the performance cycle, their performance is unlikely to be considered successful. The individual must be made aware of any issues regarding their performance, and this must be documented in writing. Please refer to the Capability Policy for further information.

4.6.6 This assessment of performance, training and development will inform the planning process for the next performance management cycle.

4.6.7 Where a teacher is not eligible for performance related pay progression an overall assessment of performance should still be recorded as this will provide a useful record for the future.

4.6.8 If no agreement of the overall assessment can be reached, the reviewer should record their view and the reviewee should add their comments. The CEO/Executive Director/Executive Headteacher/Head of School may be asked to review the situation and make a decision. Please see **Appendix B** regarding Appeals.

### 4.7 PAY PROGRESSION

4.7.1 Where employees are eligible for performance related pay progression, a recommendation will be made by the reviewer based on performance against the agreed objectives, the relevant Teacher Standards used to inform them, and any other agreed performance criteria (career stage expectations).

4.7.2 The outcome of the performance management cycle will be confirmed in writing, along with confirmation of any pay progression.

4.7.3 Successful performance management will be based on the annual assessment, outlined above. Usually the employee will move one point along the salary range of their evaluated role. The Trust's Pay Policy should be consulted for further details on pay progression.

## 4. Planning, Review and Pay Progression

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4.7.4 Those eligible for increments are those staff who:

- have completed their induction/probationary period.
- have not reached the top of their salary band.
- have been successful in the annual performance management process.
- are not in any formal support or capability, procedures.

4.7.5 In the event of an unsuccessful performance management cycle the effect on pay progression will be discussed with the individual by their line manager and confirmed in writing. The individual will also be made aware if their performance will be managed under the capability policy and procedure.

4.7.6 Completed, signed paper records of reviews need to be submitted by 30th November annually, or within two months of the end of the performance management cycle. The responsibility of retaining and submitting performance reviews is the individual's. Where staff do not submit paperwork by these deadlines then this may impact on the individual's pay progression.

### 4.8 APPEALS AGAINST DECISIONS

4.8.1 If an employee disagrees with the content of their performance management planning and review statement or wishes to appeal against a pay recommendation they can submit an Appeal. Please refer to **Appendix B** for further information.

## 5. Other Provisions

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### 5.0 OTHER PROVISIONS

#### 5.1 PERFORMANCE MANAGEMENT AND AUTHORISED LEAVE

- 5.1.1 If during the performance management cycle there is a period of long term absence (e.g. sickness absence or maternity leave), then the line manager will review performance based on the time that the individual was in work. It may be necessary to arrange observations as part of this review (teachers only). When an employee is due to go on maternity leave, their performance review should occur before their maternity leave starts, so a pay recommendation can be made at the appropriate time.
- 5.1.2 If during the performance year there is a period of long term absence (e.g. sickness absence or maternity leave), then consideration will be given to an individual's performance, up to two years prior to their long-term absence, to provide information on their performance history.
- 5.1.3 Once the employee returns to work, performance management objectives will need to be set for the remainder of the performance management cycle.

#### 5.2 EQUALITY ACT

- 5.2.1 There may be circumstances where it may be appropriate to agree and document changes to the performance management cycle, due to a disability requiring a reasonable adjustment.

#### 5.3 CHANGE OF ROLE/EMPLOYEE LEAVES DURING THE PERFORMANCE MANAGEMENT CYCLE

- 5.3.1 If an individual changes their role or responsibilities (but remains employed by the Trust), between September and May of the performance management year, the Manager for the role they are leaving will conduct a performance review for that period of the year
- 5.3.2 The Manager for the post they have moved to will set and agree objectives for their new role. These may be broadly the same, dependant on the change in role.
- 5.3.3 If an individual moves role between June to August, then the performance review will be the review used for that performance year. Objectives set for the new role will be the objectives for the forthcoming performance management cycle
- 5.3.4 The performance management cycle does not begin again in the event of a change in line manager.

## 5. Other Provisions

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- 5.3.5 When an employee is due to leave the Trust's employment, their performance review should occur before they leave. It is the employees' responsibility to arrange a performance review meeting prior to leaving the Trust's employment.



# Appendix A – Classroom Observation Protocols

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## APPENDIX A – CLASSROOM OBSERVATION PROTOCOLS

- 1.0 The Trust is committed to ensuring that lesson observations are development, constructive and supportive.
- 2.0 Those who are involved in classroom observations will:
  - carry out the role with professionalism, integrity and courtesy;
  - evaluate objectively;
  - report accurately and fairly; and
  - respect the confidentiality of the information gained.
- 3.0 The arrangements for classroom observation will be included in the planning and review template and will generally include the amount of observation, specify its primary purpose, any particular aspects of the teacher's practice which will be assessed. Generally, the duration of the observation and timing of the observation will be discussed. Ideally this should also document who will conduct the observation.
- 4.0 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 discussion with the individual and any changes documented.
- 5.0 Information gathered during the observation will be used, as appropriate, for a variety of purposes including to inform Academy self-evaluation and Academy improvement strategies in accordance with the Academy's commitment to streamlining data collection and minimising bureaucracy and workload burdens on staff.
- 6.0 In keeping with the commitment to supportive and developmental classroom observation those being observed will be notified in advance (usually at least three working days).
- 7.0 Classroom observations will only be undertaken by leaders and managers who have had adequate preparation and the appropriate professional skills to undertake observation. They will be skilled to provide constructive oral and written feedback and support, in the context of professional dialogue, between colleagues.
- 8.0 Oral feedback will be given as soon as possible after the observation and in all cases within two working days. Written feedback will be provided within five working days of the observation taking place, unless otherwise agreed. If issues emerged from an observation that were not part of the focus of the observation, these should also be covered in the written feedback and the appropriate action taken. The written record of feedback also includes the date on which the observation took place, the lesson observed and the length of the observation.

## Appendix A – Classroom Observation Protocols

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9.0 The teacher has the right to add their written comments on the feedback document.

There is no requirement to keep other notes relating to the observation. Teachers can request written records of observations from their Manager.

10.0 A CEO/Executive Director/Executive Headteacher/Head of School has a duty to evaluate the standards of teaching and learning over time and to ensure that proper standards of professional performance are established and maintained. Clearly the performance management arrangements are integral to fulfilling this duty and CEO/Executive Director/Executive Headteacher/Head of School may consider using classroom observations to assist in this process.

10.0 **There will be a limit of a total of three observations for all purposes and the total time for all observations will not exceed three hours per year.**

# Appendix B – Appeals Process

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## **APPENDIX B - APPEALS PROCESS**

1.0 The Trust is committed to ensuring that appeals against pay decisions are appropriately considered. As the performance management process is closely related to decision making around pay, the same appeals process applies to both. This means this process should be used for appeals that may arise regarding the conduct, wording, or content of the performance management process, including but not limited to the setting of objectives and review criteria, and the summary / assessment of performance.

1.1 This appeals process mirrors the Trust's grievance policy and as such any pay appeals will be considered a grievance. Employees are not able to use this process and raise a grievance under the grievance policy for the same pay decision.

### **2.0 STEP ONE – INFORMAL RESOLUTION**

2.1 A reviewee who is dissatisfied with a performance rating / pay recommendation should have the opportunity to discuss the recommendation with the reviewer and/or Head of School before the recommendation is made to the School Governance Committee (SGC).

2.2 This stage in the process will help to ensure that pay decisions are transparent and fair. The opportunity to discuss a pay decision before it is made may also help to mitigate the need for a more formal appeal.

### **3.0 STEP TWO – FORMAL REPRESENTATIONS**

3.1 If it is not possible to resolve matters informally and the reviewee believes that an incorrect pay recommendation has been made, they may make a formal representation to the Head of School or the pay committee, depending on who will be making the pay decision.

3.2 If they wish to do this, the reviewee should submit a formal written statement to the appropriate person, setting out the grounds for their opposition to the decision/content of the paperwork. They should include any evidence / witness statements that they wish to be considered in reviewing the decision.

### **4.0 STEP THREE – FORMAL APPEAL**

4.1 Once a pay determination has been made and communicated, the reviewee has the right to raise an appeal against any determination in relation to their pay or performance management review document. This appeal will be heard by a panel of three Trust representatives, not involved in the original decision.

4.2 The following list, which is not exhaustive, includes the usual reasons for seeking a review of a pay determination.

## Appendix B – Appeals Process

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That the person or committee by whom the decision was made:

- incorrectly applied any provision of the performance management or pay policy (as applicable);
- failed to have proper regard for statutory guidance;
- failed to take proper account of relevant evidence;
- took account of irrelevant or inaccurate evidence;
- was biased; or
- otherwise unlawfully discriminated against the teacher.