This letter is provided as a template and will need to be amended to suit the circumstances of each individual case. Advice should be sought from your EPM HR Adviser.

\*Please delete this box on adoption

[On headed notepaper]

EPM Model Invite to Performance Concerns Meeting

[Address]

[Date]

Dear [Name],

Meeting to Feedback Performance Concerns - Invitation

I would like to meet with you on [date] at [time] in [location] in accordance with [Part A - Appraisal] of the [School/Trust Name]’s [Appraisal and Capability Policy], paragraph [X], to discuss concerns regarding your performance as [job title].

This discussion follows on from

[insert details for TEACHERS, e.g. Learning Walks on DATE and DATE, Work Scrutiny on DATE and DATE, Lesson Observations on DATE and DATE and a review of Pupil Progress Data on DATE and DATE].

[insert details for SUPPORT, e.g. concerns relating to health and safety, site security, the financial management of the School, your ability to support pupils etc.].

The purpose of this meeting is to:

* Give you clear constructive feedback regarding the areas of concern
* Allow you the opportunity to comment and discuss the concerns
* Identify any factors potentially contributing to the performance concerns
* Identify any additional training needs or reasonable support that may be required
* Clarify the required standards and agree any reasonable support that will be provided to help you address those specific concerns (e.g. coaching, mentoring, structured observations)
* Explain how, and by when, your progress will be reviewed
* If it is appropriate, to revise objectives, and whether it will be necessary to allow sufficient time for improvement
* Outline that the amount of time will reflect the seriousness of the concerns; explain the implications and process if no, or insufficient, improvement is made

[Note to appraiser: the set timeframe for improvement will reflect the seriousness of the concerns i.e. the shorter the timeframe the more serious the concerns/impact]

* Explain the implications and next steps of the procedure if no, or insufficient, improvement is made within the set timeframe

Please find attached a copy of the [School/Trust name]’s [Appraisal and Capability Policy]. I have also attached a copy of [the Teachers’ Standards 2012] [your job description] [Career Stage Expectations], on which I have highlighted the standards about which I have concerns.

[Note: Dependent on the customer’s policy and/or preference (the policy may be silent on this point), the employee may need to be given the option to be accompanied at this meeting by a trade union representative or a workplace colleague: You may be accompanied at this meeting by a representative of your trade union or, a workplace colleague.]

Please confirm receipt of this letter and your attendance at the meeting as soon as possible. [If you choose to be accompanied at the meeting, please let me know the name and designation of your representative, or workplace colleague, as soon as possible.] Please be assured that this meeting is intended to be supportive and as such we will aim to agree a programme of support to assist you in reaching the required standards.

Yours sincerely

[Signature]

[Name]
[Job Title]