

Oulton Parish Council

Appraisal Policy & Procedure

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Introduction

Oulton Parish Council currently has one employee which is the Parish Clerk who also performs the role of Responsible Financial Officer. This appraisal policy relates to that role. If the Council in the future employs additional members of staff, the Council will ascertain an appraisal structure for these employees. Such a structure would usually correlate with line management as those in direct line management positions will be best placed to appraise an employee. The appraisal will be carried out by at least three members of the Parish Council Personnel Committee.

Purpose of Appraisal

Appraisal meetings are an opportunity for employees to seek and receive high quality, responsive and balanced feedback on their work. It is also an opportunity to identify and plan for future individual learning and development needs.

Appraisal arrangements

1. Before an appraisal, the appraisers should gain perceptions of performance with observations from Councillors and, occasionally, from members of the public who have involvement with the Clerk.
2. The appraisers are responsible for scheduling the meeting.
3. Both appraisers and the appraisee have a shared responsibility to adequately prepare for the meeting.
4. The procedure will be managed by three members of the Parish Council Personnel Committee.
5. Up to two hours should be set aside for each appraisal meeting.

The appraisal cycle

The appraisal will take place in March each year. Interim reviews should be undertaken during the year to review the progress on set objectives, or if there is a substantial change in objectives. These reviews should be an informal process.

The appraisal meeting

The appraisal meeting should be a two way discussion. The meeting should:

- Review: previous goals and discuss individual's actual performance.
- Explore: what factors affected individual performance examining both internal and external constraints and issues.
- Agree: future performance goals and identify any support and development plans for the future.
- Plan: identify training and development needs and plan for implementation including costs and timescales.
- Objectives: should be SMART (specific, measurable, achievable, relevant and time-limited).

The results of the appraisal process will be recorded on the Performance Appraisal form, which is part of the Policy document.

After the appraisal meeting, the Personnel Committee Chair will be responsible for writing up the report which will record the discussions that took place at the meeting.

The completed report should be given to the Clerk within 5 days of the appraisal meeting

The Clerk has five days to comment on and sign the written record of the appraisal meeting.

All signed reports will be kept in the individuals personnel file.

During the year, it is the responsibility of the individual to use their appraisal record as a working document and record any changes to their agreed objectives. Records should be kept of any relevant training and development undertaken during the year.

PERFORMANCE APPRAISAL FORM

Employee's name:		
Job title:		
Date of engagement:		
Reporting period:	From:	To:
Appraisers:	1)	
	2)	
	3)	
Date of meeting:		
Outline of duties:		

Targets for this reporting period:	
<i>Performance grades</i>	<i>A Above expected performance</i> <i>B In line with expected performance</i> <i>C Below expected performance</i>
Quality and quantity of work	
Comment	
Grade	
Knowledge	
Comment	
Grade	
Use of time	
Comment	

Grade		
Personal attributes		
Comment		
Grade		
Communication & IT Skills		
Comment		
Grade		
Overall assessment		
Strengths		
Areas for development and future training needs agreed		
Targets agreed for the coming year		To be completed by:

		To be completed by:
Signature of appraiser	1)	Date
Signature of appraiser	2)	Date
Signature of appraiser	3)	Date
I agree that this is an accurate record of my appraisal review		
Signature of appraisee		Date
One copy of this completed form will be kept by the appraisers, one by the appraisee and one in the employee's personnel file.		