**Claxton Parish Council**

**Appraisal Policy & Procedure**

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| **Document Control** | | | |
| Adopted date | 11 September 2019 | Minute Reference | 19.114 |
| Last reviewed | July 2023 | Minute Reference | 23.72.1.5 |
| Next review date | July 2025 | Minute Reference |  |

Claxton Parish Council currently has one employee - the 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 devise 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.

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 prepare adequately for the meeting.
4. The procedure will be managed by two members of the Parish Council Personnel Committee.
5. Up to two hours should be set aside for each appraisal meeting.

The appraisal will take place in June each year on the anniversary of the appointment of the Clerk.

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.

During the appraisal meeting, the 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.

**Confidential**

Information contained in this document is confidential between the Clerk, and their manager.

The completed master copy of this documentation is to be kept by the Reviewer:

A copy will also be kept by the Clerk.

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| **Name:** |
| **Role:** |
| **Council:** |

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| **Person conducting review:** | **Role:** |

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| **Review Period:** |

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| --- |
| **Review Date:** |

| KEY OBJECTIVES It is essential that these objectives link to relevant plans,  (e.g. Policy & Performance Plan, Business Plan, Development Plan etc.) | | ACTIONS each action should be SMART  (i.e. **S**pecific, **M**easurable, **A**chievable, **R**ealistic & **T**ime related) | **ACTIVITIES SUCCESSFULLY UNDERTAKEN TO ACHIEVE**  **KEY OBJECTIVES**  **(to be completed at the end of the PDR cycle)** |
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| **DEVELOPMENT NEEDS**  To help meet key objectives and competencies  **No.** | | **HOW TO ADDRESS NEEDS** | **TIMESCALE TO ACHIEVE** | **DEVELOPMENT ACTIVITIES UNDERTAKEN**  and examples of how your learning has been used in the workplace during the PDR cycle |
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**Confirmation of Outcomes from Review Meeting**

(to be signed after the initial review meeting when future objectives and development needs have been agreed)

**Reviewee Signature:……………………………………………… Line Manager Signature:……………………………………… Date:……………**

#### I have discussed the objectives, evidence provided and personal development plan with the job holder and I would like to recommend that the following outcome is applied:

2

1

0

Required Performance Level met: (please tick) = not fully = fully met = exceptional performance

Include the rationale for your recommendation in the Line Manager’s Remarks box below.

**End of Review Period Summary -** (to be completed at the end of the review period and competency level discussion)

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| **Line Manager’s (reviewer) Remarks:** |
| **Signature:………………………………………………………………………… Date:…………………………………………….** |

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| **Reviewee’s Remarks:** |
| **Signature:………………………………………………………………………… Date:…………………………………………….** |

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| **Countersigning Manager’s Remarks:** |
| **Signature:………………………………………………………………………..… Date:…………………………………………….** |