

# 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.

## 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 by reviewing past performance and looking ahead to set achievable objectives.

The aims of the review are to enhance quality of service through encouraging and enabling the Parish Clerk to achieve high standards of performance, and to help the Parish Clerk develop to their fullest attainable level of potential and achieve job satisfaction.

## Appraisal Arrangements

1. The appraisers are responsible for scheduling the meeting.
2. The procedure will be managed by three members of the Parish Council Personnel Committee.
3. Up to one hour should be set aside for each appraisal meeting.
4. Both appraisers and the person being appraised have a shared responsibility to adequately prepare for the meeting as follows:

**The appraisers** should gain perceptions of performance with observations from Councillors and others where appropriate.

**The appraisee** should complete the appraisal form prior to the meeting in as much detail as possible.

## Appraisal Cycle

The appraisal will take place at least once per year in March. Interim reviews should be undertaken during the year to review the progress on set objectives, or if there is a substantial change in circumstances or objectives.

## The Meeting

The appraisal meeting should be a two way discussion and should be kept informal and relaxed where appropriate.

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 for the future.

**Plan** to 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.

## Following the meeting

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

Appraisers:

Date of Meeting:

## Instructions for the Appraise:

*When completing this bear in mind that your role as Parish Clerk and Responsible Finance Officer is complex and multiplex. Refer to your current job description, giving due emphasis to the spread of roles that you have to perform and the weighting of each. In particular consider your delivery in terms of the targets for your specific responsibilities and related tasks as currently agreed.*

*You will also need to review the objectives set at the last review, whether they have been achieved or not and importantly any factors that assisted in completing them, or problems and issues that have arisen in respect of fulfilling them. This will help the Council develop/maintain best practice in supporting you and delivering its services.*

## Section 1: Job Review and Performance

Use your job description and previously agreed objectives (where these have been set) to complete this part of the form. Please review your job description, responsibilities, tasks and targets to ensure their continued relevance.

1.1. What do you feel has gone well during this reporting period?

1.2. Which parts of your job/objectives have not gone so well?

1.3. State any part of your currently approved job description, responsibilities and tasks that you are not doing for any reason.

1.4. State any areas of work that you do which are not in your currently approved job description, responsibilities and tasks.

1.5. Provide details of any Training and development you have completed during this reporting period.

1.6. How would you describe your overall performance during this reporting period?

**Use the following attributes to help grade your performance where Grade A = Above expected performance. Grade B = In line with expected performance. Grade C = Below expected performance**

<b>Attribute</b>	<b>Grade</b>	<b>Comments</b>
Quality of work		
Quantity of work		
Knowledge		
Use of time		
Communication		

## **Section2: Objective Setting**

2.1. Proposed Objectives: Use your responses in part 1 to consider what you intend to achieve next year or during the next reporting period.

2.2. Training and development: Identify what you see as your specific training and/or development needs to enable you to achieve these objectives and further your personal development:

2.3. Describe any other particular help and/or support you feel that you need from the Council to achieve your objectives and improve your performance and well being.

2.4 Any Other Comments:

## **SECTION 3: APPRAISAL FORM NOTES**

To be completed by the Appraisers/ Personnel Committee Chair in response to Section 1 and 2 and with the assistance of the results of the appraisal interview.

### **Appraiser Comments:**

3.1 Comment on section 1 Job Role and Performance

3.2 Comment on section 2

3.3. Comment on any tasks that should no longer be in the job description and any identified that should be included:

3.4 Overall assessment of the post holder's performance during the last twelve months/reporting period incorporating comments from councillors.

## **Section 4: Agreed Objectives and Training and Development Plan**

*To be agreed as part of the appraisal interview and documented here. There should be no set number of objectives, but they should be reasonable and attainable and address any issues raised in section 1. They should also be demanding enough to stretch the Parish Clerk; have direct relevance to the Council's aims and objectives or service delivery. Include any training, or personal development needed and where possible establish targets for completion. Any objective(s) that have been carried forward from the last appraisal should also be noted.*

4.1 Objectives for the next reporting period:

4.2 Training and Development Plan for the next reporting period:

## Section 5: Signing Off

**To be completed when the contents have been agreed by BOTH the Appraiser and Appraisee, AND the Objectives and Training Plan have been approved by the Council.**

Signature of:

Chairman

Date

Other Councillor Present:

Date:

Other Councillor Present:

Date:

Signature of Parish Clerk:

Date:

Note: One copy of this completed form will be kept by the appraisers, one by the employee and one in the employee's personnel file.