

STAFF APPRAISAL



Armitage with Handsacre Parish Council

Staff Appraisal Policy

Date created	Date adopted	Date last reviewed	Next review date
December 2024	December 2024	N/A	September 2026

STAFF APPRAISAL

1. POLICY STATEMENT

- 1.1** Performance and development appraisals covering all employees are delivered throughout the Council on an annual basis, with two formal review meetings during the year.
- 1.2** The purpose of the Staff Appraisal process is:
 - 1.2.1** To develop and support all employees to do their job well to deliver the Council's priorities for the benefit of our communities.
 - 1.2.2** To ensure that the Council has the right skills in the right place at the right time and to the required capacity to deliver services to agreed standards.
 - 1.2.3** To ensure that the Council is working as one Council and through its partners to deliver effective and efficient services.
 - 1.2.4** To maximise the capacity, resilience and flexibility of our people and resources to deliver our key priorities.

2. PROCESS

- 2.1** The form in the annex will be used for all appraisals.
- 2.2** The appraisal year will run from March to February. It is important that all Appraisals be completed by mid-March to ensure any Spine Point increases are paid in April.
- 2.3** The appraisal process will ensure that the Council's Aims and Values [PD021] are translated into personal, and, where relevant, team objectives. The process will ensure that employees at all levels of the Council can understand how their objectives contribute to the Council's success.
- 2.4** Line Managers must ensure that the processes are fair and equitable for all staff
- 2.5** Formal disciplinary and grievance issues are not to be part of the annual appraisal process and will be dealt with separately.
- 2.6** The appraisal meeting and report should contain no surprises.
- 2.7** Issues concerning poor performance should be recorded in the appraisal meeting documentation in order that any formal monitoring of performance is not undermined by contradictory messages being given to the employee.
- 2.8** The Appraisal process will ensure that all employees:
 - 2.8.1** have an annual face to face performance and development appraisal meeting which is reviewed quarterly.
 - 2.8.2** Receive regular meetings with their line manager to discuss their performance during the year and discuss work activity, learning and development.

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- 2.8.3 Know what is expected of them in terms of the standard of their performance from the beginning of their employment, through agreed work and training objectives.
- 2.8.4 Will have an initial appraisal, and objective setting meeting, shortly after starting their employment or new post.
- 2.8.5 Agree appropriate and SMART objectives, with their Line Manager, to achieve over the following year.
- 2.8.6 Are made aware of any areas in their work which are not to the required standard.
- 2.8.7 Areas requiring improvement are addressed during the year and not held until the end of the year annual appraisal meeting.
- 2.8.8 Receive recognition for their achievements.
- 2.8.9 Receive feedback on a regular basis which aims to improve and develop their performance.
- 2.8.10 Identify with their line manager any learning and development needs and aspirations.
- 2.8.11 Are able to identify skills and knowledge development needs.

3. NEW STARTERS

- 3.1 All new employees will be set objectives in an initial performance and development plan within one month of starting. These objectives will be monitored over the first 6 months of their employment. Managers may take a view on the level of detail included in the initial plan depending on where in the appraisal cycle the employee starts as a member of staff.

4. TEMPORARY AND FIXED TERM CONTRACTS

- 4.1 All employees on temporary and fixed term contracts will be set objectives and a development plan which will be reviewed through performance and development appraisal meetings, and which will be appropriate to the length of their employment.
- 4.2 Where possible performance and development appraisal meetings will be aligned to the normal appraisal year to ensure consistency with permanent employees and pay progression increments.

5. LONG TERM ABSENCES

- 5.1 If employees are absent during an appraisal year, objectives and timescales should be reviewed to accommodate the absence where possible. Absences due to a disability or maternity/paternity/adoption should not affect the overall outcome of the appraisal.

6. MITIGATING CIRCUMSTANCES

- 6.1 There may be occasions where an employee is unable to achieve an objective/objectives that has been agreed due to issues outside of their control. Managers need to take this into consideration and disregard that objective or objectives if there were issues outside of their control which meant they could not achieve the objective/objectives.

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7. OBJECTIVE SETTING

- 7.1 Individual performance objectives should relate to the overall Aims and Values of the Council.
- 7.2 Objectives set will be in line with the responsibility level and scope of work outlined in the employee's current, up to date job description.
- 7.3 Significant changes to objectives and action plans should be discussed with the individual employee and confirmed as and when they arise.
- 7.4 Performance against objectives should be assessed by objective evidence and both appraiser and appraisee share the responsibility for monitoring progress on the agreed objectives.
- 7.5 All appraisers will demonstrate consistency of objectives set across their team to the Chair of the Employment Committee.
- 7.6 Long term planned absences will be factored into the objective setting timescales and, where appropriate, a performance and development appraisal will be held before the absence starts.

8. RECORDING

- 8.1 A record of all appraisal meetings will be kept. They can be typed into the appraisal form or written on a printed copy. This will then be scanned and the hard copy kept under lock and key in the Clerk's filing cabinet.
- 8.2 Managers will ensure the confidentiality of all records.
- 8.3 All Appraisals must be "signed off" by the Clerk, except for the Clerk's which will be agreed with the Chair of the Council.

9. APPEALS

- 9.1 If an agreement cannot be reached between the manager and appraisee, the matter will be referred to the Clerk who may refer on to the Employment Committee.

10. CLERK'S APPRAISAL

- 10.1 This will be carried out by the Chair of the Council who should inform the Council when the appraisal has been completed.
- 10.2 The Chair of the Council must not share the content of the Clerk's appraisal with anyone, including other Councillors.

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**Armitage with Handsacre
Parish Council**

Name	
Position	
Year	

Main Duties

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Objectives agreed at last appraisal on _____

	Objective Set	Record of Achievement
1		
2		
3		
4		
5		

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Line Manager Assessment

Comment on the overall performance throughout the year

Post Holder Assessment

Any additional comments you wish to make on your performance during the year.

Objectives, for the coming year as agreed _____

1	
2	
3	
4	
5	

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Training requirements for coming year as agreed _____

1	
2	
3	

To be completed by the Line Manager and Post Holder following the review meeting.

1. We have reviewed the past year against the previously agreed objectives.
2. We have agreed a set of objectives for the coming year.
3. We have agreed a plan of other development actions including training.
4. The post holder has been provided with an opportunity to add any additional comments, which should be included within the form.
5. The line Manager has/has not made additional comments following the meeting with the post holder.

Signed _____ (Post Holder)

_____ (Line Manager)

Clerk's Assessment

I agree/disagree with the above overall assessment.

Comments

Signed (Clerk) _____