



STAFF PERFORMANCE APPRAISAL POLICY

1. Scope

This policy and procedure applies to all employees of Copythorne Parish Council (“the Council”).

2. Policy

The Council’s policy is that each employee will be appraised annually.

The summary of this appraisal should be a fair representation of the dialogue and is to be referred to as a working document throughout the forthcoming year.

The benefits of appraisal in terms of improved communication and enhanced performance both for the individual and for the Council will only be achieved by the continuous commitment of all those involved in the scheme.

The Council’s appraisal scheme has been designed to meet the following objectives:

- To assist staff in performing their job to the best of their ability, maximising their job satisfaction and their contribution to the Council’s objectives.
- To identify individual training and development needs.
- To highlight the potential that each individual has to develop within their current or a future position.

3. Procedure

1. Appraisal interviews will occur annually. They are intended to take place during October. New and newly-promoted employees will be appraised in the third month of their new job and then reviewed at the end of their probationary period as detailed in their contract of employment.
2. The Clerk is responsible for ensuring that appraisals are carried out for all staff. Appraisal interviews will be carried out by the job-holder’s line manager on a one-to-one basis. Training will be provided to all appraisers prior to conducting their first appraisal interview. For the Clerk the Appraisal will be carried out by two members of the Personnel and Governance Advisory Committee which will include the Chairman of the Council whenever possible who will have previously sought the views of other Councillors.
3. Each October (or in the third month of employment for new and newly-promoted employees) the appraiser should prepare the following documentation for all employees:
 - Appraisal Interview Reports (copy of the one from the previous review period and a new one)
 - Self Appraisal Notes
4. The appraisers then arrange the dates, times and locations of the appraisals, and notify each employee.

5. The employee will be given a copy of the Self Appraisal Notes for their completion. The Appraisal form and Self Appraisal Form will then be swapped prior to the appraisal interview, to allow both parties to prepare. Generally at least five working days should be given to enable employees to adequately prepare for the interview.
6. The appraisal interviews should take place from the Clerk level downwards to facilitate the communication of the Council's objectives.
7. The following chart represents the sequence of events followed by the appraiser regarding the three stages of the appraisal process:-

The Appraiser and The Appraisee	
Preparation	
Gathers	Relevant documentation including the mission statement, Council objectives
Completes	The Performance Review template.
The interview	
Asks for the employee's comments	On their own performance based on their Self Appraisal Notes
Discusses with the employee and seeks to agree conclusions	On all sections of the Performance Review template
Completes	All sections and asks the employee to make general comments as well as sign and date the form
Summarises	Own general comments and signs and dates the form
Follow-up	
Keep notes	Of the follow-up actions required to facilitate the achievement of objectives/targets and/or general training and development needs
Gives	The Appraisal Interview Report to his/her manager for signature
Ensures	Follow-up action takes place as appropriate

8. The appraiser's manager must sign and return the Interview Report Form to the Clerk. The Clerk will retain the original form securely after sending a copy to the employee. In the case of the Clerk the form will be retained by the Chairman of the Council
9. The Clerk will be responsible for collating the information provided on the Appraisal Interview Reports and, in particular, for identifying those training and development needs that are common to groups of employees and those that are key to the achievement of Council objectives. The Clerk will update the training and development plan in order to prioritise the provision of solutions for the identified needs.
10. The completed Appraisal Interview Report will be viewed as a working document and will be continually referred to and reviewed during the year. Where the objectives/targets agreed at the appraisal interview have changed, new objectives/targets should be agreed.

11. It is expected that in addition to the Annual Appraisal Interview a minimum of one interim review takes place throughout the year; ideally a review will occur quarterly.

Abuse of this policy

Any abuse in the application of this policy will be dealt with in accordance with the Council's Disciplinary Policy and Procedure and may possibly result in disciplinary action being taken, up to and including dismissal.

Alterations and amendments to this policy

This policy does not form part of an employee's contract of employment. The Council reserves the right to amend or withdraw this Policy at its absolute discretion, in accordance with the needs of the council.

Additional information

For further information, please contact the Chairman of the Personnel & Governance Advisory Committee.

- POLICY ENDS -

Date of Adoption: 13/10/2020

Date(s) of review: xx/xx/xxxx

STAFF PERFORMANCE REVIEW TEMPLATE



Date: xx/xx/xxxx

Attending:

Headings for Discussion – to be undertaken by reviewee and reviewer:

- 1. Past 3/6/12* months – Areas of success / achievement / done well
- 2. Past 3/6/12* months – Areas where could have done better / didn't succeed
- 3. Past 3/6/12* months – Learning Points/Areas for Improvement (maximum 3)
(* Delete others to leave relevant period under review)

Reviewer Sheet: Draft Comments for Discussion (continue on separate sheet if needed)

Overall Comment:

Areas of Achievement / Success

Areas where could have done better

Learning Points / Improvement Suggestions – to be agreed

Future Activity and Development

Signed: _____

Signed: _____

Date: _____

Date: _____