



Heybridge Parish Council

Appraisals Policy

1. Introduction

1.1 Heybridge Parish Council is committed to maximising individual performance and potential and will provide the necessary feedback, support, and training to ensure that high standards of performance are maintained throughout the organisation. Appraisal meetings are an opportunity for people to seek and receive high quality, responsive and balanced feedback on their work performance from their manager. It is also an opportunity to identify and plan for future individual learning and development needs.

2. Purpose of Appraisal

2.2 The main purposes of an appraisal interview are to:

- Discuss positive achievements over the past 12 months and/or during probation period. To identify reasons for good performance.
- Discuss instances where targets have not been met, jointly identifying factors preventing those goals being achieved.
- Agree standards of performance and behaviour by setting objectives, priorities and targets that are realistic and achievable.
- Provide a formal written record of performance and evidence of key objectives planned for the future.
- Encourage individuals to develop their skills and competencies through a planned approach to personal development and training, supported by the organisation.
- Discuss any training, personal or professional development needs and agree a Performance Plan to ensure that set objectives can be met and high levels of performance maintained.
- Explore long term training and development needs or educational goals that will support individual career pathways and develop the level of skills and expertise within the organisation.

3. Reporting Arrangements

The reporting arrangement for Heybridge Parish Council are as follows:-

- Parish Clerk – The Clerk is responsible to the Parish Council as a corporate body, however for the purposes of performance management, appraisal will be carried out by the Chair of the Personnel Committee.
- Other Staff – The Clerk acts as line manager on a day to day basis, however performance appraisal will be undertaken by the Clerk in conjunction with one member of the Personnel Committee.

4. The Appraisal Cycle

4.1 The annual appraisal meeting should take place during March of each year prior to the start of the next financial year. Although appraisers are responsible for scheduling the appraisal meeting, both Appraisers and individuals have a shared responsibility throughout the appraisal process to ensure objectives are met and reviewed as appropriate. Individuals also have a responsibility to adequately prepare for performance reviews and to ensure they complete their part of the process on time. Informal interim reviews may also be undertaken during the year if considered necessary e.g. if there is a substantial change in objectives.

4.2 New employees will initially be subject to a 3 month period of probation, during which performance reviews will be undertaken after 1 month, 3 months.

5. Setting Objectives

5.1 The Clerk and/or Personnel Committee is responsible for agreeing individual objectives. It is hard to generalise about the number of objectives an individual will be set, however, as a guide, the number of key objectives should be a maximum of six. All objectives should be in the form of the well-known acronym of SMART (Specific; Measureable; Agreed; Realistic; Time-Bound.)

6. Individual Preparation

6.1 The 'Self-Appraisal Form' has been produced to assist individuals in identifying relevant events and issues that can be discussed at the appraisal meeting. It is important that some thought is given to identifying future priorities and tasks for the next twelve months. Consideration should also be given to how the proposed objectives can be achieved and the resources, training, advice or support that will be needed to achieve them.

7. Manager Preparation

7.1 The Manager should agree a date for the appraisal meeting which will allow the individual enough time to adequately prepare for the meeting.

7.2 Prior to the meeting the Manager should undertake a full review of performance and achievements over the previous year, using the current Appraisal Form as a starting point. He/she should identify examples of: positive achievements and achievement of targets; times where targets have not been met; any skills gaps or future training needs for the individual and future team/organisational objectives.

7.3 Managers may find the self-appraisal form a useful checklist when making their own preparations.

8. The Annual Appraisal Meeting

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

- Review: previous objectives and discuss individual's actual performance. Both parties should concentrate on established facts rather than on unsubstantiated opinions.
- Explore: what factors affected individual performance examining both internal and external constraints and issues.
- Agree: future performance objectives and identify any support and development plans for the future. Targets set should be achievable and realistic in light of available resources including time, and should be capable of being monitored.
- Plan: identify training and development needs and plan for implementation including costs and timescales.

9. Administration

9.1 At the appraisal interview the Appraisal Manager and individual will initially review the individual's previous objectives and the degree to which these have been met.

9.2 They will then proceed to work through the areas set out on the appraisal form.

9.3 After the Appraisal Meeting, the Manager will then be responsible for writing up the appraisal form, recording the discussions that took place at the meeting. The completed form will be given to the appraisee to read, add their comments and return. All signed Appraisal Forms will be kept in the individual's personal file.

9.4 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 also be kept of any relevant training and development undertaken during the year.

10. Personal Development Portfolios

10.1 In order to support the appraisal process individuals may wish to keep a Personal Development Portfolio (PDP). This can include any evidence of achievements, training plans and continuing professional development.

11. Implications for Pay

11.1 Completed appraisal forms will be one of the mechanisms considered by Heybridge Parish Council when determining whether a salary increase should be awarded.

Clerk

25 March 2015

Reviewed April 2016. Reviewed and agreed 18 May 2017.