



KEYNSHAM TOWN COUNCIL

STAFF APPRAISAL POLICY AND PROCEDURE

SECTION 1 - POLICY STATEMENT

1. Introduction

1.1 The Council is committed to the support and development of all staff (employees and volunteers) in order that they can perform and reach their full potential in the role that they have with the Council.

1.2 The Council sees this being achieved by the Town Clerk and Line Managers having regular meetings and conducting an annual appraisal review with all staff (The annual appraisal will be underpinned by regular review meetings to measure progress against set objectives and the agreed personal development plan).

1.3 The Council is committed in developing a culture in which, job objectives, performance, capabilities, strengths, and the potential for development can be discussed openly and honestly

1.4 The Council believes that by having these processes in place will enhance communications between the Town Clerk, Line Managers and staff and can help to improve the quality of working relationships, Staff's motivation, job satisfaction and personal development.

2. Aims and Objectives

2.1 Develop a clear understanding between the Town Clerk, Line Manager and Staff about their job role and performance.

2.2 Acknowledge good performance.

2.3 Initiate corrective action in relation to poor or unacceptable performance.

2.4 Help Staff to develop their professional skills and maximise their potential for growth and development to benefit the Council and service delivery to users of our services.

2.5 Assist the Chair of council, town clerk and Line Managers in making responsible objective assessments by the identification of training and development needs. Staff development includes professional development and judgments about priorities outlined in the Council's overall strategy.

3. The Council's philosophy behind appraisals

- 3.1** All Staff should be entitled to seek and receive responsible and balanced reviews and feedback on their performance in their role.
- 3.2** Appraisal reports will always be maintained in the written form and will be "open" between the two parties concerned with no confidential parts.
Attached, as Appendix 1, is the pro forma that should be used to maintain written records of employee appraisal reviews.
- 3.3** There will be a formal annual review undertaken between Staff and their immediate Line Manager, to refer to points covered at the appraisal interview and agreed action plan.
- 3.4** Review of job performance should be related to clearly stated objective targets that should be measurable and achievable and agreed between both parties.
- 3.5** Individuals are entitled to seek and receive counselling and guidance on career development and their future with the Council in the formal review sessions.
- 3.6** The Council, in making judgements about investments in providing training or development facilities, and opportunities for individuals and deciding priorities, has legitimate need for information on training and development needs identified in the appraisal interview.
- 3.7** A statement of training and development needs produced by Line Managers should be based on the periodic reviews with their members of staff and training needs agreed between everyone and their manager/supervisor.
- 3.8** It is the responsibility of every Line Manager within the Council to be involved in undertaking appraisals which are designed to improve individual and organisational performance.
- 3.9** The Council is committed to providing support in terms of training and development of skills required by managers to be able to undertake appraisal reviews.
- 3.10** The appraisal records are official Council records and therefore will be retained on individual personnel files by the Town Clerk.
- 3.11** In between the formal appraisal meetings review meetings must be held to monitor progress against objectives set between the formal appraisal reviews.

4. Responsibility for Implementation

4.1 The Personnel Committee has responsibility of ensuring that the Town Clerk has an appraisal interview (the interview to be conducted by the Chair or Vice Chair of the Personnel Committee) and that regular review meetings are undertaken to ensure that the agreed organisation strategy and business objectives are being delivered and that the Town Clerk receives appropriate training to implement this policy.

4.2 The Town Clerk is responsible for ensuring that Line Managers undertake staff appraisals in line with the above policy. This will include appropriate training and development of managers/supervisors with the skills that they require to conduct review/appraisal meetings

4.3 The Town Clerk is also responsible for ensuring that all Line Managers have an appraisal interview and regular review meetings are undertaken and ensuring that all staff are aware of this policy and the responsibility that it places on all the Council Staff.

4.4 Line Managers are responsible for conducting appraisal for employees directly reporting to them, that written records are maintained and filed on Staff's personnel files (in the Town Clerk's office)

4.5 All Staff are required to participate in individual appraisal and regular review meetings with their identified manager/supervisor.

SECTION 2- PROCEDURE AND GUIDANCE

5. Appraisal procedure

5.1 The appraisal scheme is made up of five key elements, namely

- self-assessment
- an annual appraisal meeting
- jointly agreed tasks, objectives and training and development activities for the following year
- mapping progress through agreed review meetings throughout the year.
- maintaining the ongoing link between the outcomes and benefits of the annual appraisal and review meeting and to the Council's corporate aims and objectives.

The whole process and the new objectives and training and development plans will derive and flow from objectives that have been previously set and the Council's ongoing corporate objectives, values, standards and priorities.

5.2 The appraisal meeting will take place annually and be conducted with the by the Line Manager on behalf of the Council who will report on the outcome of the appraisal to the Town Clerk (unless he/she has personally undertaken the appraisal).

In preparation for the appraisal meeting, the employee or volunteer (the Appraisee) must complete the self-assessment included in the Appraisal Review Form and some key issues to be considered are: -

- what has been achieved over the past twelve months and what benefit and/or contribution has been made to the business;
- how the job could have been performed better - thinking of the things which might have been done more efficiently or effectively i.e. what could have been done to improve performance;
- the most important personal and technical skills used or needed in the job;
- whether the current skill range and level is appropriate to the job or could the job be done better if further knowledge, skills and training were developed;
- whether any relevant skill, knowledge or expertise which is not now being used in the job but could be used;
- what obstacles have arisen during the last year that got in the way of performing the job as might have been wished;
- whether, and in what ways, more support and guidance to resolve such issues, develop skills or change things to enable the job to be done even better are needed;
- whether there are any matters outside of work that are affecting performance;
- what are the main job tasks and priorities over the next year; and
- What training and other personal development needs exist or are desired.

The Appraisee should give due emphasis in the above to the spread of tasks that they must perform and where relevant consider examples of work issues (positive and negative) in support of the responses to ensure that there will be an open and constructive discussion at the appraisal meeting.

- 5.3** All appraisal meetings must be 'open' and 'two way' which means that the appraisee will be expected to contribute fully to the discussion and take the opportunity to comment on, for example, the level and type of support received from the Council and their manager/supervisor.

The appraisal meeting should be structured as follows: -

(a) Introduction

The purpose, scope and format of the appraisal meeting will be explained by the Line Manager.

(b) Self-Assessment

Prior to the appraisal meeting the Appraisee will have reviewed their performance over the past year and be able to comment on: -

- what went well during the year?
- how far you met the objectives for the year?
- what, of note, did you achieve during the year?

- what did you enjoy most/least in respect of the work undertaken?
- what did you consider to be your key strengths and weaknesses?
- what additional support do you require from the Council?
- any outstanding performance problems that require attention.

The Appraisee will be forwarded the appraisal form at Appendix 1 and they should complete Section 2 of the Self-Assessment form, and return this to their Line Manager at least two weeks before the date of the appraisal meeting.

(c) Job Review, Key Tasks and Objectives

The Appraisee's job description will be jointly reviewed and any necessary changes agreed as part of the meeting and the opportunity should be taken to clarify any tasks of which they are unsure or might like to lose.

In addition, the previous year's objectives will be reviewed and the achievements or learning opportunities from the previous year identified along with the reasons behind them.

If there are potential increases or decreases in duties that affect a job description the amendments will be taken to the Personnel Committee to consider any pay scale changes. Prior to the Personnel Committee, the job description changes will be referred to the Town Council HR advises for agreement. Any changes or amendments to any job description will be undertaken with the agreement of staff member that it affects.

(d) Feedback on Performance

Feedback on performance during the year will be given by the Line Manager which will include any significant achievements, strengths and, where relevant, areas for improvement that have prevented the completion of objectives. Where agreed weaknesses are identified, solutions or steps that can be taken to overcome barriers to more effective performance will be agreed, which may include identified training need.

The feedback will be factual, supportive, honest and constructive. At the end of the feedback the employee or volunteer will be given an opportunity to comment and record any mitigating circumstances or obstacles that have prevented them from completing key tasks or objectives. An opportunity will also be taken to identify how the Council can better support and help the individual to realise their potential and performance.

(e) Training and Development

Any training and the development needs will be discussed in respect of both the existing job and the future needs of the Council. Development opportunities may include training, work experience and new responsibilities.

(f) Future Targets and Objectives

A new set of objectives or key tasks will be jointly agreed for the following appraisal year which will be: -

- understandable
- achievable
- measurable
- timetabled
- prioritised
- challenging; and
- limited in number.

(g) Conclusion of Meeting

The Appraisee should have an opportunity to ask any further questions at the end of the meeting and the key outcomes of the meeting will be summarised to ensure that there is common understanding of the objectives and the action points.

- 5.4** Shortly after the meeting, the main outcomes of the meeting and the agreed objectives and tasks for the following year will be summarised in writing in Section 3 of the Appraisal Review Form and a copy given to the post holder for agreement. The Plan will be signed off by both parties and a copy of the form given to the appraisee whilst the original is held on the Personnel File.

The employee or volunteer and the Line Manager supported by the Town Clerk will be responsible for ensuring that the agreed tasks are implemented, training is provided and objectives are then met during the following review period.

Progress on these points will be discussed or reviewed at regular review meetings during the year.

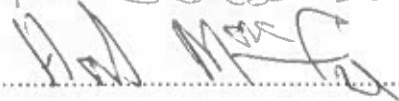
- 5.5** Any questions on the appraisal procedure in general should be addressed to the Town Clerk.

Amendment History

| Paragraph | Detail | Committee or Town Council | Approval date |
|---------------|--------|---------------------------|-------------------------------|
| New Policy | | | |
| Review date | | Personnel Committee | 5 th October 2023 |
| Approval date | | Town Council | 17 th October 2023 |
| Next Review | | | October 2025 |

Approved by Town Council

Date: 17th October 2023

Signed  Chair of Council

Signed  Town Clerk

