Performance Appraisal Policy

1 APPRAISAL POLICY

Kingsbury Parish Council is committed to supporting every employee to reach their potential and achieve their personal goals, which in turn will assist the council to achieve its objectives.

The performance appraisal policy supports the performance appraisal scheme. The scheme is a formal process centred on an annual meeting of each employee and their line manager and chair of HR Group to discuss his/her work. The purpose of the meeting is to review the previous year's achievements and to set objectives for the following year. These should align individual employees' goals and objectives with the council's goals and objectives.

In practice, the Parish Clerk is the only person employed by Kingsbury Parish Council. The line manager is the Chair who conducts the appraisal process in conjunction with the HR Group and Parish Clerk. Councillors will also support the process by providing their feedback regarding the Clerk's performance during the period under review along with future development needs.

2 CORE PRINCIPLES OF THE APPRAISAL POLICY

- The appraisal process aims to improve the effectiveness of this council by contributing to achieving a well-motivated and competent workforce.
- Appraisal is an ongoing process with an annual formal meeting to review progress.
- The appraisal discussion is a two-way communication exercise to ensure that both the needs of the individual, and of the parish council are being met, and will be met in the next year.
- The appraisal discussion will review the previous year's achievement and will set an agreed Personal Development Plan for the coming year for each member of staff.
- All employees who have completed their probationary period are required to participate in the appraisal process.
- The appraisal process will be used to identify the individual's development needs and support the objectives of the Training and Development Policy.
- The appraisal process will provide the council with valuable data to assist succession planning.
- The appraisal process will be a fair and equitable process in line with the council's Equality Policy.

3 PERFORMANCE APPRAISAL IMPLEMENTATION

Performance appraisal discussions will be held on an annual basis (ideally, prior to approval of the council's budget for the next fiscal year). This will allow budgeting for any salary increment and external training costs.

The appraisal will be arranged by the employee's line manager. HR Group are encouraged to provide the opportunity for an additional 6-month verbal appraisal review, mid-year, and other informal reviews as necessary throughout the year. The discussions will be held in private. Information shared during the appraisal will be shared only with members of the council; confidentiality of appraisal will be respected.

The appraisers will be expected to have successfully completed appraiser training, and to be familiar with the employee's work.

All appraisal documents should be issued to all parties prior to the discussion, to allow time for all parties to reflect and prepare. These will provide a framework and focus for the discussion.

A time and venue for the discussion will be advised at least one week before the meeting takes place.

4 THE APPRAISAL DISCUSSION

The appraisal discussion will allow an opportunity for both the employee, and the appraisers to reflect and comment on the previous year's achievements. It will praise achievement and encourage the appraisee in his/her role.

The appraisers are accountable for giving the employee constructive, timely and honest appraisals of their performance, which should consider both the goals of the parish council and of the individual.

The discussion should be a positive dialogue and focus on assisting the employee to acquire the relevant knowledge, skills, and competencies to perform his/her current role to the best of his/her abilities.

The appropriate forms will be completed and signed by both parties. The appraisee will be given the opportunity to note any comments that he/she does not agree with and complete a self-assessment.

The appraisee and HR Group should agree on a Personal Development Plan for the appraisee for the following year. This will reflect the employee's aspirations and the council's requirements and should align personal and council goals. The council and the HR Group will support the individual to achieve these goals during the forthcoming year.

Any training needs, future training requirements, planned qualifications, development opportunities and career planning should be discussed in the light of the Personal Development Plan.

5 THE MECHANICS OF THE PERFORMANCE APPRAISAL PROCESS

- The key elements of the process are driven by several key documents and forms as follows:
- The process is driven by the formal Job Description which sets out the key responsibilities of the employee.
- Each responsibility from the Job Description is further expanded to show the Key Tasks
- that are expected to be performed to support that area of responsibility.
- Where appropriate, each Key Task has one or more Measurable Targets which are used to determine whether the employee has achieved the expected standard for each of the Key Tasks.
- These Measurable Targets are agreed in writing with the employee as a part of the Annual Objective and Goal Setting process.
- Prior to the Annual Appraisal Process all Councillors complete a Councillor Survey Form in which they provide their view on the performance of the employee. This is by reference to the Job Description and the Measurable Targets that have been agreed for the review period. The Councillor Survey Form invites comments on performance against each Job Responsibility and an overall performance rating against that responsibility.
- When completed by all Council Members, the Councillor Surveys are then summarized to provide an Overall Performance Summary which is issued to the employee prior to the Appraisal Meeting along with the prior year's Completed Appraisal Form, if employed in the prior year.

- The employee completes an Employee Performance Self-Assessment Form in which the employee similarly assesses their performance against each responsibility by reference to the targets and identifies what has gone well in the review period and where they may need help to improve their performance, including support and personal development, and training needs. The Self-Assessment is provided to the person(s) conducting the Annual Appraisal prior to the Appraisal Meeting.
- The Overall Performance Summary and Employee Self-Assessment Forms are used to drive the face-to-face Appraisal Meeting.
- The main output from the meeting is a Draft Appraisal Form prepared by the Appraiser(s), which is circulated to the employee for review and comment. The Draft Appraisal Form contains a written assessment of the employee's past year performance (strengths along with areas for improvement) and objectives, targets, and a Personal Development Plan for the following year. The Plan will differentiate between actions required by the Council and those by the employee to ensure the Council's objectives are met.
- The completed Draft Appraisal Form is passed to the employee and issues with the contents are resolved.
- The Appraiser and HR Group then prepares a summary report showing the next year's objectives, targets, actions, and development plan for agreement by the Council.
- When these are agreed at the next council meeting, the Appraisal Form is signed by the Appraiser(s) and the Employee.
- The content will be shared only with other Council Members and not the General Public and so will be in private session.

6 SUGGESTED APPRAISAL CALENDAR

The suggested timing and responsibility for these activities is shown below:

Appraisal Calendar for the Clerk

Action	Who	Timing
Circulate Councillors Survey Form to all Members along with Job Description and Targets	HR Appraisal Committee	
Issue Self-Appraisal Form and Prior Year Appraisal to Clerk	HR Appraisal Committee	
Return Councillors Survey Forms to HR Committee	Council Members	
Complete Self-Appraisal Form and return to Chair	Clerk	
Collate Members comments and prepare Summary Survey Form for Clerk	HR Committee Meeting	
Prepare Appraisal Form for current period	HR Appraisal Committee	
Consider outstanding issues from Clerk's review of Appraisal Form	HR Committee	
Conduct Appraisal Interview with Chairman and HR Group	Chair and another Councillor	
Circulate Final Appraisal Form to Clerk and HR group	Clerk and HR Committee	

Prepare summary report for Council to seek agreement on new objectives, actions, changes to targets and training plan	HR Committee Meeting	
Final Form signed off by Clerk, Chair and Vice Chair following agreement of objectives and training plan by Council as part of reporting back procedure	Clerk HR Committee	

7 REVIEWS AND ADOPTION

This policy will be reviewed annually from the date of adoption by KPC.

Adopted at the Parish Council Meeting on 28TH September 2023 (Minute 207)

8 REVISION CONTROL

Revision	Details of Change
Sep 23	New document
Mar 25	Policy updated to new template; minor typo corrections made
June 26	Policy reviewed and adopted Min No 697