



Brixham Town Council

Annual Appraisal Policy

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Written by	Tracy Hallett, Town Clerk

Brixham Town Council Annual Appraisal Policy

General

The council's Annual Review is designed to promote both the development needs of the Council and its employees in the context of reviewing past priorities and achievements. In addition, it allows employees to consider obstacles to success and helps them to find ways of removing them.

All performance and development appraisal procedures must ensure that the Council's vision, values and objectives are translated into personal, and, where relevant, team objectives to ensure that employees at all levels of the Council can see and understand that the objectives they are set contribute to the Council's success as a whole.

The form in the annex will be used for all appraisals.

The Town Clerks appraisal will be carried out first, then the Deputy Town Clerks, then other staffing levels.

The appraisals will need to be completed October each year to feed any budget considerations into the budget review cycle.

Appraisers must ensure that all appraisal processes are fair and equitable for all appraisees and that they are applied in line with the Council's Equality and Diversity Policy and Guidance.

Formal disciplinary and grievance issues are not to be part of any performance and development appraisal procedure and will be dealt with separately. It is important that any issue concerning poor performance is recorded in the performance and development appraisal meeting documentation in order that any formal monitoring of performance (through the Capability Policy) is not undermined by contradictory messages being given to the employee.

The Aims and Objectives for the Scheme are:

This policy aims to create a performance management framework to:

- enhance the quality of service delivery and overall development of the Council through encouraging each employee to achieve the mutually agreed priorities;
- identify and provide the support that enables employees to achieve those priorities and at the same time gain satisfaction in the work.

And to ensure that all employees:

- have an annual face to face performance and development appraisal meeting which is reviewed a minimum of six monthly
- receive regular meetings with their line manager to discuss their performance during the year and discuss work activity, learning and development
- know what is expected of them in terms of the standard of their performance from the beginning of their employment

- are set appropriate and SMART objectives with their appraiser to achieve over the following year
- are made aware of any areas in their work which are not to the required standard
- receive recognition for their achievements
- receive feedback on a regular basis which aims to improve and develop their performance
- identify with their line manager their learning and development needs and aspirations
- are able to identify skills and knowledge development needs

New starters

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 through the Probation Procedure. 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.

Temporary and fixed term contracts

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. 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.

Long term absences including maternity/adoption leave

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/adoption should not affect the overall outcome of the appraisal.

Mitigating Circumstances

There may be occasions where an employee is unable to achieve an objective/objectives they have been set 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.

Objective setting

- Individual performance objectives should relate to the overall objectives of the service area.
- Objectives set will be in line with the responsibility level and scope of work outlined in the appraisee's current, up to date job description.
- Significant changes to objectives and action plans should be discussed with the individual employee and confirmed as and when they arise.
- Performance against objectives should be assessed by objective evidence and both appraiser and appraisee share the responsibility for monitoring progress on the agreed objectives.
- All appraisers will demonstrate consistency of objectives set across their team to their line manager.
- 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.

Recording

A record of all performance and development 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 kept. A copy of all appraisals will be kept on personnel files and remain confidential.

Appeals

If an agreement cannot be reached between the manager and appraisee, the matter will be referred to either:

- the Town Clerk who may refer on to the Finance and General Purposes Committee;
or
- the Finance and General Purposes Committee where the manager or appraisee is the Town Clerk

Town Clerks Appraisal

This will be carried out by one nominated Councillor from the Finance and General Purposes Committee and one Councillor nominated by the Town Clerk.

Section 1: Employee to Complete this Section

(Use your job description and previously agreed objectives to complete this section of the form. Please review your job description to ensure continued relevance)

Name:

Position:

Date Appointed to Current Job:

1. Performance Over the Review Year
1.1 How would you describe your overall performance in the past twelve months?
1.2 Which parts of your job have you performed most effectively?
1.3 Which parts of your job have not gone so well?
1.4 State any part of your job description that you are not doing.
1.5 State any areas of work which are not in your job description.

2. Your Skills and Expertise
2.1 What are your key strengths in your job?
2.2 What additional skills and expertise have you gained over the period?
2.3 Do you possess skills and strengths not fully used in your job?
3. Development Needs
3.1 What parts of your job do you find most difficult and why do you find them difficult?
3.2 Has a lack of a particular experience or skill affected your performance?
3.3 What additional training have you undertaken during the review period?
3.4 How effective has this training been?

3.5 What additional training or experience would now be of benefit to help you achieve future targets/objectives?

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Objective/Target Setting

(Use your job description and any Council's aims and objectives to consider what you intend to achieve next year)

3.6 What potential individual objectives/targets do you want to discuss with your appraiser?

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3.5 What potential objectives/targets have high priority?

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3.6 Describe any particular help and/or support you feel you need to achieve your objectives/targets.

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Section 2: Appraiser to Complete This Section

Name:

Date of Appraisal:

Period Covered From: **To:**

*Consider what the employee has written in Section 1 and make comments in this section (**Section 2**). When you have completed the appraisal interview and agreed objectives, training and development plans the overall summary and plans for the following year should be summarised in **Section 3**. You should obtain the employee's comments and signature in **Section 4** and give the employee a copy of the full document for their records.*

1. Agreed Objectives

(although there are no set number of objectives those set should cover key aspects of the employee's job and have direct relevance to any Council aims and objectives).

1.	
2.	
3.	
4.	
5.	

2. Comments
2.1 Comment on identified main achievements (<i>add anything else that was done particularly well</i>)
2.2 Comment on work or anything else which has not gone well
2.3 Comment on any tasks that should no longer be in the job description and any that should be included
2.4 Give your overall assessment of the employee's performance during the last twelve months (include strengths, weaknesses and any constraints to their work and the outcome of specific agreed objectives).

Section 3: Future Plans

(this section provides an opportunity to record objectives for the coming year, agree training/development plans)

1. Agreed Objectives

(although there are no set number of objectives those set should cover key aspects of the employee's job and have direct relevance to any Council aims and objectives.

1.	
2.	
3.	
4.	
5.	

3. Training/Development actions

Section 4: Employee Comments

(This section provides space for the employee to comment on the completed form and the appraisal process)

Signature of Appraisee

Signature(s) of Appraiser(s)

Date