



## Staff Appraisal Policy, October 2023

POLICY REVIEW	annually
signed	
Minute reference	115/23 a i
Date ratified	28 <sup>th</sup> November 2023
Date of next review	November 2024

### 1. Introduction

1.1 This procedure reflects the aims of Durrington Town Council “The Council” to provide a framework through which the appraising manager (appraiser), and the employee (appraisee), maximise achievements, output, quality of work and effectiveness.

1.2 This policy applies to all employees of the Council with the exception of casual or seasonal employees. Such staff will be performance managed in other ways.

### 2. Aims

2.1 Appraisals are essential for the effective management and evaluation of staff. Appraisals help develop individuals, improve organisational performance and feed into strategic planning.

2.2 Annual performance appraisals enable management and monitoring of standards, agreeing expectations and objectives, delegation of responsibilities and tasks, and career and succession planning – for individuals and the Council as a whole.

2.3 Performance appraisals are also important for staff motivation, attitude, and behaviour development, communicating and aligning individuals and the Council aims, and fostering positive relationships between management and staff.

2.4 Performance appraisals form part of the performance management of employees. Line managers are crucial in this system in ensuring that their team members know and understand what is expected of them.

### **3. Process**

3.1 Formal performance appraisals are conducted annually for all permanent staff in the employ of the Council, usually in September or October. Mid Term Review Meetings take place in March/April. However, this does not preclude further meetings throughout the year to review progress if required by staff or employer.

3.2 Each member of staff is appraised by their line manager. The Town Clerk is appraised by the Chair of the Council and the Chair of the Staffing Committee.

3.3 In order to be effective, it is important that both appraisee and appraiser are comfortable with and have bought in to the appraisal process and purpose.

3.4 Technical training may be sought and where necessary made available to line managers or the aforementioned councillors to ensure they have a good understanding with what is expected from them and their responsibilities as an appraiser.

3.5 Each member of staff will complete the appraisee self-reflection part of the Appraisal Form and submit this to their line manager by a pre-agreed time.

3.6 The line manager will arrange an appraisal meeting at a suitable time and date, in a room free from distractions. The meeting will take the form of a free-flowing conversation during which a range of views is exchanged.

3.7 It is anticipated that the following will be discussed at a minimum:

- Review past 12 months performance and previous appraisal goals and objectives;
- Discuss the information gathered in the self-appraisal form;
- Agree and set future goals and objectives;
- Agree future training and development needs/requests.

3.8 After the meeting, the appraiser completes the Appraisal Form which is given to the appraisee within 14 working days of the meeting. The appraisee reviews and signs the Appraisal Form, retaining one copy while the other is attached to their employee personal/personnel file.

3.9 During March/April a Mid-Term Review meeting will take place to ensure no concerns are left unresolved.

### **4. Report**

4.1 After all appraisals have been carried out the Town Clerk will produce a report for the Staffing Committee with a generic overview of the appraisals and the training needs identified.

4.2 Confidentiality will be respected, and the report will seek only to summarise matters. The Appraisal Form will not be submitted as part of the report to the Staffing Committee.

### **5. Guidance for the appraiser**

5.1 Where it has been agreed that the appraisal should concentrate on specific aspects of the appraisee's job, information collection should likewise concentrate on those aspects.

5.2 Appraisers should act with sensitivity to all concerned and should not exhibit any bias in collecting information.

5.3 General comments should be supported by specific examples.

5.4 Interviews for the purpose of information collection should be held on a one-to-one basis (except in the case of the Town Clerk).

5.5 Any information received anonymously should not be used.

5.6 Information which does not relate to the professional performance of a member of staff should not be sought or accepted.

5.7 Those giving information should be encouraged to make fair and considered comments which they are prepared to acknowledge and to substantiate if required.

5.8 Any written submissions should remain confidential to the author.

5.9 The substance of grievance or disciplinary proceedings should never be used in the appraisal process.

Date of policy: November 2023

Approving committee: Staffing

Date of committee meeting: 7<sup>th</sup> November 2023

Policy version reference:

Supersedes:

Policy effective from:

Date for next review: November 2024.

**APPENDIX: Appraisal Form**

<b>Durrington Town Council – Appraisal Form</b>		
<b>Name of Appraiser:</b>		<b>Date of Appraisal Meeting:</b>
<b>Name of Appraisee:</b>		
<b>Employee Pre-Appraisal Self Reflection</b>		
Do you have an accurate job description? Does it need changing? If yes, please list any changes required.		
Do you understand the requirements of your job?		
Do you have regular opportunities to discuss your work with your team leader?		
Do you know the objectives for your performance and professional development set at your last review meeting? Do you think you have achieved those objectives?		
Which aspects of your job do you do well? Have you done something of which you are particularly proud?		
Which aspects of your job do you do less well or find difficult?		
What particular challenges or frustrations have you faced since your last review?		
Do you possess particular knowledge, skills or experience which you feel are not currently being utilised?		
Do you have any specific support or professional development needs?		
What are your hopes, priorities and aspirations for your work over the coming year? New ideas welcome.		

<b>Appraiser &amp; Appraisee Planning and Agreeing Performance Objectives</b>	
1. Discuss the current job description. Is it accurate for this role? If not, what changes are required?	
2. What progress has been made towards achieving the performance objectives detailed at the last review?	
3. Discuss aspects of the job which have gone well.	
4. Discuss aspects of the job which have gone less well or proved challenging. Is any further action required to resolve difficulties?	
5. Do you possess particular knowledge, skills or experience which you feel are not currently being utilised?	

<b>Performance Management Objectives – 2023-2024</b>	
Objective 1	
Objective 2	
Objective 3	
<b>SUMMARY OF TRAINING &amp; DEVELOPMENT NEEDS</b>	
Comments Appraiser:	Comments Appraisee:
Signature and Date Appraiser:	Signature and Date Appraisee:
<b>Mid Term Review Meeting</b>	Date:
Actions required.	

Signature Appraiser	Signature Appraisee

<b>Performance Review Meeting</b>	Date:
Objectives	Met/Not Met, comments
Objective 1	
Objective 2	
Objective 3	
Signature Appraiser	Signature Appraisee
Date	Date