



# Moulton Parish Council

<https://moultonpc.org.uk>

## STAFF APPRAISAL POLICY

### Appraisal Policy

- 1.1 Moulton Parish Council recognises that appraisals are vital to Employee Development. The objective of an appraisal is to review employee performance and potential.
- 1.2 Employee Appraisals will be carried out annually, in accordance with council procedures, and in time for the annual salary adjustments to take place without delay. The annual appraisal should usually take place in November.
- 1.3 Interim appraisals will be carried out semi-annually to enable the monitoring and amendment to appraisal objectives.
- 1.4 Appraisals will be carried out by two appointed councillors of the HR Committee. ACAS recommends that appraisers must have adequate training to enable them to make fair and objective assessments and to carry out effective appraisal interviews.
- 1.6 Appraisals and Interim appraisals will be recorded in line with council procedures and kept securely.
- 1.7 An appraisal summary shall be reported to the HR Committee following appraisals having taken place.
- 1.8 For employees in a probationary period, employment will only be confirmed following a satisfactory interim appraisal. The probationary period may be extended by an additional 3 months if required, in this instance an interim appraisal will take place after each 3-month period.

### Arrangements

The appraisal will be carried out annually. It is recommended that regular informal meetings and interim reviews are carried out to enable both employees and line managers at the annual review will have a fair idea of how the year has gone. The annual appraisal interview is not the place to raise serious issues of under-performance for the first time. If serious underperformance issues are identified outside the appraisal timescale, an extraordinary meeting can be called to address these.

The Moulton Parish Council staff appraisal invitation letter will be sent to the Employee a minimum of two weeks prior to the suggested date giving full preparation information. (Appendix 1)

### Objectives

The main objectives of the appraisal interview are to:

- Create/review employee's development plan
- Review employee's performance and potential
- To record present and future responsibilities
- To ensure that ideas and views are shared
- Identify strengths and weaknesses
- Receive recognition for achievements
- Identify any areas of concern

- To assist employees to develop their fullest attainable level of potential and achieve job satisfaction
- Set achievable targets for the following year
- Identify any training requirements

## **The appraisal meeting**

The appraisal interview should be at a venue agreeable to both parties. It should be an open two-way discussion with the employee having had the opportunity to consider the recommendations of the invitation letter as to what to bring with them for the appraisal and what items will require consideration. (Appendix 2)

The appraiser will complete the appraisal form (Appendix 3) and write a report of the interview within 1 month of the appraisal date and give a copy to the appraisee who will then have the opportunity to agree or make comments that the report is a fair record of the appraisal interview and, if this is the case sign two copies:

- \* One copy for the appraisee to keep
- \* One copy for the Council's confidential personnel records.

## **Employees Comments**

The section on the interview document gives the employee space on the completed form to declare agreement or any comments.

## **Confidentiality**

Only the appraisers see the completed appraisal record who then report to full council that an appraisal has taken place but the contents remain confidential.

# Appendix 1



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## **STAFF APPRAISAL SCHEME LETTER**

Dear.....

You are invited to attend your annual appraisal interview on:.....

I enclose a copy of your last appraisal, which took place on:.....

We will discuss your development plan and set key objectives/targets that we agree on at this meeting and which will be form part of the discussions at your future appraisals. We would invite to set your own key objectives/targets (maximum 2) which should be work related but may not form part of your daily duties.

It may help you to note what have been your strong and weak points during the year, what you see as barriers to effective performance, your plans for the coming year and your development and training needs.

It will also be helpful if you bring a copy of your current job description so that any agreed options can be discussed and any amendments presented to the next meeting of the HR Committee and if supported proposed at the following Full Council Meeting.

I hope that you are able to attend this meeting and look forward to your acceptance.

Signed:.....

Position: .....

Date: .....

## Appendix 2



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### **EMPLOYEE APPRAISAL PERFORMANCE THINGS TO CONSIDER**

1. How do you think your job is progressing?
2. Has your job changed over the past year?
3. What do you feel have been your best achievements over the past year?
4. Are there any areas where you feel you have not performed as well as you could have?
5. Are there any reasons why you feel you have not performed well?
6. Are there any problem areas?
7. Have you any ideas for improvements?
8. Key Objectives set in your development plan in previous appraisal.
9. Key Objectives you would like adding to your development plan for the year ahead.
10. Are there any training requirements in order to achieve targets?

## Appendix 3



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## ANNUAL STAFF APPRAISAL FORM

NAME OF EMPLOYEE	
POST HELD	
DATE OF APPOINTMENT	
DATE OF ANNUAL REVIEW	

Purpose of Job	
Brief description of duties	
Key objectives & Targets from last appraisal	

### DETAILED ASSESSMENT OF PERFORMANCE OF DUTIES

Markings

- A Well above the performance expected
- B Consistently above the acceptable standard of the grade
- C Generally, achieves the acceptable standard of the grade. Meets all the requirements of the job
- D Not quite up to an acceptable standard, shows some general weaknesses
- E Consistently below the acceptable standard
- F Performance well below the expected level

1	<b>Knowledge of Duties</b>	A	B	C	D	E	F
(Comments here)							

2	<b>Quality of Work</b>	A	B	C	D	E	F
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3	<b>Quantity of Work</b>	A	B	C	D	E	F
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4	<b>Relations With Others</b>	A	B	C	D	E	F
---	------------------------------	---	---	---	---	---	---

5	<b>Communication Skills</b>	A	B	C	D	E	F
---	-----------------------------	---	---	---	---	---	---

6	<b>Manual/Numeric/Operational skills</b>	A	B	C	D	E	F
(where applicable)							

7	<b>Supervision/Oversight of Staff</b>	A	B	C	D	E	F
(where applicable)							

**Strengths:**

**Weaknesses:**

**ATTENDANCE** and any specific factors affecting overall performance

**Training Needs and Qualifications**

Identified by employee:

Identified by employer:

**OVERALL ASSESSMENT** (*tick*):

Exceeded performance	
Average performance	
Under performance	

Key Objectives for coming year (set by appraiser)	1)
	2)
Key Objectives for coming year (set by employee)	1)
	2)

Appraisal performed by: .....

Signature of Appraising Lead :.....

Date:.....

**ADDITIONAL COMMENTS**

Signature of Countersigning Appraiser (if any)

Date:



**NOTES OF APPRAISAL INTERVIEW (including appraisee's responses)**

Appraisee's signature – I have been offered the facility to see this report and I agree that the above is an accurate record of the views exchanged in the appraisal meeting

Signature:.....

Date:.....