



UPLYME PARISH COUNCIL

Performance Management Policy

1. PURPOSE OF THE SCHEME

- 1.1. The Council recognises the benefits of regular and constructive performance review for both their employees and for the organisation. The Council is committed to ensuring that employees are provided with support to enable them to work as effectively as possible. Individual performance will be reviewed on at least an annual basis, plus an interim review to check progress against objectives carried out six months after the main review.
- 1.2. One of the ways in which such support can be provided is through the performance management scheme, which provides a systematic opportunity to:
 - recognise the achievements of staff over the previous year;
 - identify ways in which performance can be improved to the benefit of both the individual and the organisation;
 - agree performance objectives and targets for the coming year; and
 - identify development/training needs and prepare a personal development plan.
- 1.3. A copy of the appraisal form is at the end of this document.

2. THE PERFORMANCE REVIEW

- 2.1. Performance will be reviewed on an annual basis e.g. October, and objectives will be set in line with the Council's Action Plan.
- 2.2. All appraisal documents should be signed and it is only the signed copy that is accepted as the final agreed document. Only the Clerk's objectives will be reported to council and not the whole appraisal document.
- 2.3. The Clerk will be reviewed by the Chair of the Council, as the Councillor who works closest with the Proper Officer. At the objective setting meeting, an additional Councillor who is a member of the Estates & Personnel Committee and who is experienced in conducting appraisals, will be present. The review and appraisal shall be reported in writing and will be subject to approval by resolution of the Council.
- 2.4. For a performance review to be successful and effective it is essential that both the reviewer and the employee prepare. A date should be set for the review meeting at least 1 week prior to the discussion taking place. The supporting paperwork including the record from the previous year's review and the objectives must be provided to the employee when setting the date. The job description will be reviewed as part of this process, in order to ensure it is a clear reflection of the role and may be changed by mutual agreement if there are substantial, material and permanent changes to the role. It is accepted that all job roles are formed of both a number of specific objectives and general performance skills such as planning and prioritising workload, communicating appropriately, working collaboratively with others and being flexible and adaptable. All aspects of the job will be reviewed.

2.5. In order to carry out their role and to meet new objectives it is recognised that, from time to time, employees will need further personal development. Personal development is not simply about attending training courses. Development and training opportunities can be provided by a variety of means, but they should be realistic for both the individual and the council, whilst taking into account operational requirements. Opportunities may include:

- a) on or off job coaching;
- b) mentoring;
- c) shadowing other staff;
- d) taking on new responsibilities;
- e) undertaking project work or contributing to working parties;
- f) professional updating;
- g) attending conferences, seminars and symposia;
- h) training courses and workshops;
- i) guided reading;
- j) networking; or
- k) e-learning.

3. RIGHT OF APPEAL

3.1. In the event that the Clerk and reviewer, usually the Chair, are unable to agree on the review of performance or objectives set, then two different members of the Estates & Personnel Committee will review the disputed information in discussion with the Clerk and original reviewer to enable an agreed resolution.

4. CONFIDENTIALITY

4.1. In line with employment legislation, the content of the review will be confidential between the reviewer(s) and the employee. The Council will retain the forms for personal files and use the information to prepare any required training plan.

5. RESPONSIBILITY FOR THE SCHEME

5.1. Line managers are responsible for preparing and carrying out reviews and setting objectives in a timely and consistent manner. They are also responsible for following up agreed action or objectives.

5.2. Responsibility for monitoring the process and ensuring it is carried out consistently rests with the Clerk. The Estates & Personnel Committee will monitor progress to ensure all review discussions and interim reviews are carried out at the appropriate times and that agreed personal development is carried out



UPLYME PARISH COUNCIL

Annual Staff Appraisal Form

Name of Employee	
Post Held	
Date of Appointment	
Report Date	

Current Job
Purpose of Job
Description of duties
Targets

Detailed Assessment of Performance of Duties

Key to Gradings

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 Knowledge of Duties
(Comments here)

A	B	C	D	E	F
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2 Quality of Work
(Comments here)

A	B	C	D	E	F
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3 Quantity of Work
(Comments here)

A	B	C	D	E	F
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4 Relations With Others
(Comments here)

A	B	C	D	E	F
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5 Communication Skills
(Comments here)

A	B	C	D	E	F
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

6 Manual/Operational skills
(where applicable)
(Comments here)

A	B	C	D	E	F
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

7 Supervision/Oversight of Contractors
(where applicable)
(Comments here)

A	B	C	D	E	F
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

8 Attendance and any specific factors affecting overall performance

9 Training and Qualifications

Overall Assessment

☐ Acceptable

☐ Not Acceptable

Strengths

Weaknesses

Signature of Appraising Manager/Appraiser:
Appraising Manager/ Appraiser:
Length of time Appraising:
Position Held:
Date:

Additional Comments
Name/Signature of Countersigning Manager
Date:

Appraisee's comments

Interests and career aspirations

SUMMARY OF OBJECTIVES

OBJECTIVES

Including action to be taken to improve performance on current job and specific development and training action by:

1. the Appraisee target date
2. the Appraising Manager target date
3. External sources target date (if appropriate)

Appraisee's signature: I have been offered the opportunity to see this report and I agree that the above is an accurate record of the views exchanged.
Signature
Signature of Appraising Manager