

STAFF ANNUAL APPRAISAL

Name.....

Position.....

Date of Meeting.....

General

The Council's Annual Review is designed to promote both the development needs of the Council and of the Clerk, within the context of reviewing past priorities and achievements and steps that might assist with the delivery of future priorities. In addition it encourages the Parish Council to agree the key priorities for the year ahead and consider any obstacles to success (in achieving them) and helps to find ways of removing such obstacles.

The Objectives for the Scheme are:

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

Procedure

It is recommended that appraisals are not undertaken until both the appraisers and appraisee have undertaken appraisal training.

It is recommended that, prior to the appraisal meeting taking place; the Parish Council formally agrees a statement of its key priorities for the forthcoming year. Such agreed priorities will form the basis of the objectives set within the appraisal process for the forthcoming year. Formal agreement of those priorities by the Parish Council in advance of the appraisal meeting will make it easier for the Parish Council to approve a final version of the appraisal documents later in the appraisal process (see below).

Appraisals are to be undertaken by the Chairman and Vice-Chairman acting together and meeting with the Clerk.

The philosophy of appraisal meetings should be "no surprises" – thus, if either the Clerk or the Appraisers feel difficulties have been encountered during the year in delivering the Council's objectives, those concerns should have been shared at the time, and prior to the appraisal meeting.

Once the appraisal paperwork has been completed, it is subject to approval in a confidential/closed session of the Parish Council. The document has no formal status until it has Parish Council approval. This is required by the Council's Standing Orders.

This process must focus on appraisal matters (relating to the delivery of Council objectives). Other procedures exist for dealing with grievances, disciplinary matters and dignity at work; the appraisal process should not be used to try to resolve issues relating to those procedures.

To the post holder

Please review your current job description and the objectives set at the beginning of the last appraisal period, and comment on the achievements you feel you have made this year and the problems that have occurred. Note any significant departures from the job description as written and why this has occurred, together with any impact that it has had on attainment of your priorities.

Indicate where you feel that there are opportunity areas for developing your job and role with an explanation of the benefits to the Council as well as likely costs.

Where you identify either a resource, support or knowledge-base issue as producing reasons for not achieving your priorities, be quite open and honest. In that way the Council can best consider how to offer the support that may be needed, or restructure the job.

Please consider the agreed objectives of the Parish Council when drafting objectives for the year ahead and identify any learning & development activities that might help achieve them.

To the Appraisers

Consider carefully the parish Council's agreed objectives, and what has been written, and be prepared to explore fully any issues that have been raised, as well as those you wish to raise independently. Give adequate time for discussion.

Section 1A *Looking back to the previous year.*

To be completed by the post holder. Look at the most important aspects of your job description, note the key objectives and priorities set at the beginning of the appraisal year. State how it went.

Job description item	Objectives and priorities	What did you achieve?	What problems did you have?

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Consider your role. Do you feel that the job description adequately describes the job? What would you add or remove? Do you understand how your role contributes to meeting the council's overall objectives?

Section 1B *Looking ahead to the forthcoming year (to be drafted on the basis of the Parish Council's agreed objectives and finalised in consultation with the appraisers)*

Job description item	Objectives and priorities for the year ahead	Is new training or personal development needed to achieve the new objectives?	How and when will any personal development be obtained?

Section 2

To be completed by the Appraisers

Consider what the employee has written in Section 1 and make your own comments.

Concentrate on areas of success and areas where there are difficulties or disappointment noted, or where there is a specific wish to receive support in some form. Note that any objectives should cover key aspects of the post holder's job. They should have direct relevance to the Council's aims and objectives for the next year.

Comment here on the overall performance. How did it go from the council's viewpoint? Do you agree with the assessment of achievements and problems? Are there any other areas which you would like to discuss?

To be written by the appraisee once the above box has been completed (optional)

Comment on the appraisal process and outcome

Section 3

- 1) We have reviewed the past year and agreed a set of objectives and priorities for the coming year. These are attached.
- 2) We have / have not revised the job description which is/is not attached.
- 3) We have/ have not agreed a plan of other development actions including training and this is/is not attached.
- 4) The post holder has/ has not made additional comments and these are included (if applicable)
- 5) The Appraisers have/have not made additional comments and these are attached (if applicable).

Signature of Post Holder.....

Signature(s) of Appraisers

..... **(Chairman)**

..... **(Vice-Chairman)**

Date.....

*The document **drafted** as above is to be submitted to a meeting of the Parish Council for approval. This is to ensure that the whole Parish Council supports the appraisal outcome and the objectives (plus development needs) set for the forthcoming year. The appraisal documentation is not finalised and has no official status until it has been approved during a confidential/closed session of the Parish Council.*

Section 4

Approval by Parish Council

If necessary, amend the documentation as approved by the Parish Council, and note the minute reference of that approval here:

Approved at Parish Council meeting on: _____, minute reference _____.