

Winterbourne Parish Council

Appraisal Policy – Parish Clerk/RFO

Winterbourne Parish Council currently has one employee, the Clerk, who also performs the role of Responsible Financial Officer. This appraisal policy relates to that role.

If the Council in the future employs additional members of staff, the Council will ascertain an appraisal structure for these employees. Such a structure would usually correlate with line management as those in direct line management positions will be best placed to appraise an employee.

Purpose of appraisal:

To provide an opportunity for the Clerk and one or more members of the Parish Council to discuss performance against agreed objectives and support the personal development of the Clerk consistent with the needs of the organisation.

The appraisal cycle:

The appraisal cycle will be annually and from the date of the last appraisal date. In the case of a new Clerk being appointed, a six-month review will be held. Appraisal will normally be held at the start of the calendar year.

Identifying the appraiser(s):

The appraisal cycle will be managed by the Parish Council. The appraisal will be conducted by two councillors. One appraiser will normally be the Chairman of the Parish Council. The Clerk will have the opportunity to propose the second appraiser.

Preparation for the appraisal meeting:

The appraisers will invite all councillors to provide feedback on performance and development needs prior to the appraisal meeting. The Clerk may invite others to provide feedback to the appraisers.

The appraisers and Clerk will set a date for the formal appraisal meeting. To assist the process, the appraisee should consider questions listed at Annex A under “Preparation for Appraisal: appraisee”. This is intended to support the process and will not form part of the finished appraisal documentation. The appraiser will similarly prepare for the appraisal by considering the questions under “Preparation for Appraisal: appraiser” to which other Councillors can have an input before the appraisal meeting (gathering evidence, above). This is also intended to support the process and will not form part of the finished appraisal documentation.

Appraisal meeting:

A constructive, open, two-way discussion on performance and development needs is the core of the appraisal. The following will be key features of the appraisal meeting:

- Review of previous year's objectives
- Discussion of achievements and concerns
- Agreeing objectives for the next year (no set number but all need to be SMART)
- Summary and agreement

The results of the appraisal process will be recorded on the Performance Appraisal form, which is at Annex B. This record should cover the key points of discussion between appraiser and appraisee, objectives for the next year, and identified training/development needs.

A copy of the form will be kept securely by both appraiser and Clerk.

Confidentiality and GDPR:

Discussions, notes and records arising from the appraisal process shall be regarded as confidential. All Parish Council discussions shall take place in the absence of members of the public as provided for in the Standing Orders.

Annex A: Preparation for Appraisal:

Clerk to Winterbourne Parish Council and Responsible Financial Officer

1. What aspects of the role you feel you do well?
2. Are there aspects of the role you find difficult/problematic?
3. How might any such difficulties/problems be overcome?
4. What training (if any) do you feel you need?
5. What further support (if any) do you feel you need?
6. What areas do you think will be your main objectives in the next six to 12 months?

Appraiser

Note: all councillors, not just those carrying out the appraisal, could contribute to these answers which are intended to inform the discussion at the appraisal meeting.

1. What are the Council's main requirements of the Clerk/RFO role? (needs to align with the Job Description)
2. What are the employee's strengths/accomplishments in relation to this role?
3. Are there any problems/difficulties? (be prepared to cite examples and evaluate performance against objectives)
4. What are the main objectives of the Council for the next year?
5. How do you think the Clerk/RFO help the Council to achieve these objectives?

Annex B: Winterbourne Parish Council Development and Appraisal Form

Name:

Job title:

Period under review:

from

to

Date of meeting:

Review of performance (with reference to post description & previous years' objectives)

What went well? What went less well? What obstacles hindered progress? What changes (if any) are proposed to the post description?

Agreed objectives for next year

What are the 4-6 objectives for the next year? Objectives should derive from the outcome of the review, relate to agreed training and development (as set out below), or represent priorities for the coming year in line with the Parish Council objectives.

Personal Development

What are the needs and opportunities for training and development in the next year? What will be the commitment (time, cost) and what will the outcome(s)?

Signed & dated:
Clerk
Appraisers

Adopted by the Winterbourne Parish Council meeting held on 16/10/19