



Performance Policy

Adopted on July 19th 2021

1. The aims of this policy

This policy provides a guide to employees on the purpose of the performance appraisal and to ensure that the work performance and training needs of every employee are managed effectively and fairly.

Fernwood Parish Council recognises that employees perform most effectively when they have clear expectations of their job role and purpose, their own targets or objectives, and of the wider aims of Fernwood Parish Council.

2. Annual Performance Appraisals

Annual Performance Appraisals are conducted to ensure that employees:

- know what is expected of them i.e., the required standard of performance and how they should do their jobs
- receive feedback which aims to improve and develop performance and recognise their achievements
- identify areas where improvement is required and training and development needs
- have a mutually agreed plan to achieve both development goals and employee career development.

Annual performance appraisals give individual employees and their manager an opportunity to review performance, work content, loads and volume, to look back on what has been achieved during the past year then agree future objectives. It is also the time an employee can agree personal objectives, and any learning and development requirements which may help.

The appraisal system is designed to:

- be a positive process
- raise the quality of services provided by motivating
- increase job satisfaction
- identify appropriate training and development requirements

The appraisal form will also be used as the basis for probationary reviews. The appraisal form is at Appendix 2.

3. Roles and Responsibilities

Fernwood Parish Council is responsible for:

- ensuring job descriptions are up to date
- monitoring the implementation of this policy
- ensuring that appropriate training and development is available for the Parish Clerk and employees
- ensuring annual appraisals have been conducted for all staff including a written record
- appraising employees in a fair and objective manner against agreed objectives and action plans
- appointing two Councillors to conduct the Clerk's Annual Appraisal.

The Clerk is responsible for:

- ensuring annual performance appraisals have been conducted for all staff including a written record and that staff are clear about what is expected of them
- reporting to the Personnel Committee to confirm that the appraisals have been carried out, along with any recommendations
- ensuring that new employees have work targets and objectives set as part of induction
- informing employees how the appraisal scheme works and how it will affect them
- following up actions arising from appraisals.

All Employees are responsible for:

- taking an active role in reviewing their performance appraisal and target setting
- completing agreed actions.

4. Appraisal Process

a. Self-assessment

Employees must be informed of the appraisal at least 2 weeks before the appraisal one-to-one meeting. A copy of the appraisal self-assessment form (found in Appendix 1) should be given to the employee so the employee has an opportunity to contribute.

A copy of the completed self-assessment form should be returned to the manager 1 week before the appraisal one-to-one meeting.

b. Appraisal Performance

The manager will use the job description, previous appraisal form and self assessment form to prepare for an appraisal meeting. They will consider what criteria to use to measure employee performance over the next year.

c. The One-to-One Meeting and Appraisal Record

The appraisal one-to-one meeting will be carried out in private so as to provide for confidentiality. Sufficient time will be allocated so that the meeting is unhurried and any discussion is properly considered. However, it must be understood by the employee and the manager that information discussed in an appraisal may need to be disclosed to others.

The appraisal form (found in Appendix 2) should be used to record an employee / manager meeting. This form should be completed by the appraiser at, or immediately following the meeting and countersigned by the employee and the appraiser's manager so the employee is aware of the competencies that are critical for effective performance of that role. A copy of the form should be given to the employee as soon as possible.

Employees may use as a last resort Fernwood Parish Council grievance procedure to resolve problems as to the accuracy or the fairness of the appraisal.

d. Non-Compliance

All employees have a role to play in enforcing the policy and are required to deal with any observed or reported breaches.

Failure to comply with this policy may lead to a lack of clarity over job role, training needs or expected standards of performance, resulting in reduced effectiveness or efficiency, underperformance and putting service delivery at risk.

Any member of staff refusing to observe the policy will be liable to disciplinary action in accordance with Fernwood Parish Council 's Disciplinary Policy up to and including dismissal.

5. Implementation of the Policy

Overall responsibility for policy implementation and review rests with Fernwood Parish Council. However, all employees are required to adhere to and support the implementation of the policy. The Parish Clerk will inform all existing employees about this policy and their role in the implementation of the policy. They will also give all new employees notice of the policy on induction to Fernwood Parish Council.

6. Monitoring Policy

The policy will be monitored on an on-going basis by the Personnel Committee; monitoring of the policy is essential to assess how effective Fernwood Parish Council has been.

7. Reviewing Policy

This policy will be reviewed annually and, if necessary, revised in the light of legislative or codes of practice and organisational changes. Improvements will be made to the management by learning from experience and the use of established reviews.

Should any amendments, revisions, or updates be made to this policy it is the responsibility of the Parish Clerk to ensure all employees receive notice.

Appendix 1: Self Appraisal Template



SELF APPRAISAL FORM¹

This form may be used when an employee is asked to make an assessment of his/her own performance and needs, for discussion with the manager/assessor

Name

Date of appraisal __/__/____

Your next Appraisal Meeting will take place on:

Date: __/__/__

Time:

Purpose of the Meeting

To enable you to discuss, with your manager, your job performance and your future. The discussion should aim at a clearer understanding of:

- (a) The main scope and purpose of your job
- (b) Agreements on your objectives and tasks
- (c) Standards or targets for measuring your performance
- (d) Your training and future prospects

You can prepare for the meeting and discussion by completing this form.

You may show this form to your manager. This will give him or her time to consider your problems and suggestions. If you do so, it will not be copied or filed without your permission.

If you prefer, you can use this form for your own guidance only, and not show it to anyone.

You will be given the opportunity to read the appraisal form prepared by your manager; you will be able to add your comments, and sign the appraisal form.

Bring to the appraisal meeting:

- *your current job description*
- *your current action plan*

¹ Based on [ACAS template](#)

Self appraisal

Name

1. Mark the appropriate answers, and comment below

(a) Do you have an up-to-date job description? Yes No

(b) Do you have an up-to-date action plan? Yes No

(c) Do you understand all the requirements of your job? Yes No

(d) Do you have regular opportunities to discuss your work, and action plans? Yes No

(e) Have you carried out the improvements agreed with your manager at the last appropriate meeting? Yes No

2. What have you accomplished, over and above the minimum requirements of your job description, in the period under review (consider the early part of the period as well as more recent events)? Have you made any innovations?

.....

3. List any difficulties you have in carrying out your work. Were there any obstacles outside your own control which prevented you from performing effectively?

.....

4. What parts of your job, do you:

(a) do best?

.....

(b) do less well?

.....

(c) have difficulty with?

.....

(d) fail to enjoy?

.....

5. Have you any skills, aptitudes, or knowledge not fully utilised in your job? If so, what are they and how could they be used?

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6. Can you suggest training which would help to improve your performance or development?

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7. Additional remarks, notes, questions, or suggestions

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Appendix 2: Appraisal Template



APPRAISAL FORM²

This form is used to record the issues discussed at an employee’s performance appraisal meeting.

Employee’s name:	
Job title:	
Date of engagement:	
Manager:	
Date of meeting:	
Current performance	
<i>Objective/competence 1:</i> State the objective/competence and record the results of discussion on the key areas of the job. Include a summary of achievement against the objective.	
<i>Objective/competence 2:</i>	
<i>Objective/competence 3:</i>	
<i>Development summary:</i> Record any areas of the employee’s work where further training and support is required or would be beneficial, and any areas where performance is particularly strong but could be developed even further.	

² Based on [ACAS template](#)

Development and training

This section should list specific requirements for any training or development. This may include training courses, attachments, projects, coaching, planned experience or any other suitable activity that will enhance the skills, knowledge and behaviour required in the employee's work or help him/her to develop.

Career planning

This section should record any areas of the organisation in which the employee has expressed a specific interest.

Other areas of discussion

This section should record any other points raised at the appraisal meeting.

Assessment Level

This is based on performance over the year against objectives achieved

Outstanding performance

(Objectives exceeded and competencies more than fully demonstrated)

Standard performance

(Objectives met and competencies fully demonstrated at required levels)

Less than standard performance with development needs

(Most objectives met but development required to fully meet some/all objectives)

Unsatisfactory performance

(Performance unacceptable; objectives not met and competencies not demonstrated)

Note: This level of assessment will require further action. Either further training should be provided (if appropriate) or consideration should be given to issuing a warning.

Employee's signature:

Note: This signature acknowledges that you have read the above appraisal and discussed it with your manager. It does not necessarily imply that you agree with the assessments.

Employee's Comments: Note: Here you may express agreement or disagreement with the assessment, or add any other comments you wish.	
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Appraiser's signature:	
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Date:	
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Reviewing manager's signature:	
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Date:	
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One copy of this completed form must be handed to the employee and one will be placed in the employee's personnel file. A copy may also be retained by the appraiser.