



**Calstock Parish Council**

# **Staff Support and Appraisal Policy**

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**2017**



# **CALSTOCK PARISH COUNCIL**

## **STAFF SUPPORT AND APPRAISAL POLICY**

### **1. Purpose**

The purpose of Parish Council's staff support and appraisal process is

**To allow every member of staff to:**

- Feel fully supported
- Feel valued
- Have a framework for clear and consistent assessment of overall performance
- Know where they stand
- Express their views formally
- Receive guidance
- Know the way forward -i.e. their objectives

**To allow the Parish Council to:**

- Support, encourage and assist staff in their roles
- Improve Parish Council performance
- Develop staff so that they can be more productive, more motivated and have more job satisfaction
- Help develop the Parish Council through suggestions and feedback from staff
- Allow a process of two-way communication
- Establish training needs

### **2. Who should be supported and appraised?**

It is the Parish Council's goal to support and appraise its entire staff.

### **3. Support of Staff**

#### **i. Clerk**

The Council Chairperson will meet for regular informal/formal discussions with the Clerk, at least once a month, to consider in general all aspects of Council business.

The Chairperson of the Personnel Committee should hold quarterly discussions with the Clerk on general personnel matters.

The Clerk should also approach the Council Chairperson and/or the Chairperson of the Personnel Committee for help, support and advice whenever they felt it is required.



## ii. All Other Staff

All staff will meet either individually or collectively with others with their line manager at least weekly intervals, to review the previous week and plan the next. They should feel free to discuss any matter that is relevant to their work.

At any other time, all members of staff should feel free to talk to their line manager if they require help, support or advice. These talks should take place immediately if they relate to health and safety matters and before any related tasks are commenced.

All line managers and staff should develop open and approachable relationships. However, all members of staff are encouraged to communicate confidentially with the Council Chairperson and/or Chairperson of the Personnel Committee any matter they feel they cannot discuss with their line managers.

All requests for help and support and any related actions will be recorded and filed appropriately.

## 4. When Should Staff be Appraised?

Staff in established positions should be formally appraised annually with an informal review after six months. The action plan and training needs should be discussed to establish progress and to move the process forward.

Staff who are new to the Parish Council or in a new role, should receive a Job Specification and their objectives and targets when they start in their new position. The objectives and targets will be reviewed after the first three months. After this they will fit in to the normal appraisal cycle.

### **Time table for the appraisal process,**

A formal appraisal of the Parish Clerk should be completed annually within the Council year and informally six months later.

All other staff should be formally appraised annually and informally six months later.

## 5. Types of Appraisal

**Formal Appraisals** will be conducted with each member of staff, their line manager (for all staff except the Clerk) together with the current Council Chairperson and/or the Chairperson of the Personnel Committee (or their nominated representatives). Every member of staff is entitled to request that their line manager be excluded from part or all the appraisal. Requests should be submitted at the time of the pre-appraisal documentation direct to the Chair of the personnel committee.

**Informal Review** will be a review of current objectives on a form, progress any



difficulties, led by appraiser with line manager/chair.

The appraisal will include the following: -

- A review of the previous appraisal
- An assessment of overall performance since the last appraisal considering the abilities and skills required by the individual to perform satisfactorily within their current post as prescribed in the relevant job specification
- Completion of a new set of appraisal forms, agreed between the appraisers and the employee, which will include a training needs list for any training, skills or experience that will need to be provided outside of day to day work activities.

## **6. Recording and Duration of the Appraisal Interviews.**

All requests and appraisals will be fully recorded on the appraisals form set and maintained within each employee's personnel records. In addition, every employee will maintain a copy which they will maintain and update as required.

The appraisal interview will be flexible to meet the individual needs but should not normally exceed 30 – 45 minutes and may if necessary be split into more than one meeting.

## **7. The Appraisal Process**

### **i. Instigation**

The Clerk will remind the Council and staff member concerned one month before a review or appraisal is due.

### **ii. Pre-Appraisal**

The Clerk will distribute appraisal forms two weeks prior to the appraisal and collected them in one week before the appraisal.

The person being appraised must complete their Self-Appraisal form.

The Line Manager must review the last appraisal and prepare for the appraisal interview by referring to all inputs and the relevant job specification.

### **iii. The Appraisal**

The appraisal will be conducted by reviewing the Self-Appraisal form, the job specification, agreed objectives, previous action plans and training needs.

During the interview, a new action plan should be drawn up. This action plan should include any training skills or experience and often will include day to day work



activities.

A training needs list should also be made for any training, skills or experience that will need to be provided outside of day to day work activities.

#### **iv. Annual Staff Appraisal Form**

As soon as possible following the appraisal, the line-manager should produce a written appraisal form, which will have been drawn up during the appraisal. The appraisal form will include:

- Details of objectives which were agreed for the appraisal period in question;
- An assessment of the employee's performance against their objectives;
- An assessment of an employee's professional development needs and identification of any action that should be taken to meet them.

#### **v. Post Appraisal**

The appraiser is responsible for ensuring that the correct documentation is copied and filed as appropriate.

The original appraisal or review form will be filed in the personnel record of the person being appraised. The person being appraised will also receive a copy of the appraisal form.

### **8. Appeal Procedure**

Following the receipt of the written appraisal report, the employee can comment on the report if they are dissatisfied with any of the points raised in the report.

In the first instance, the employee should discuss the matter with the appraiser and seek to resolve these concerns.

If following a discussion there remains disagreement on the content, objectives or outcomes, the employee can appeal in writing to the chair of the Finance & General Purposes Committee of the Parish Council.

An appeals panel will be established consisting of the chair of the Finance & General Purposes Committee or their nominated representative and two members of the Council who have not been involved in the appraisal.

The appeals panel will meet within 10 working days of receipt of the appeal, although the employee can request a postponement and suggest an alternative date within five days of the original date.



The appeals panel will investigate the issues raised in the employee's letter of appeal. The panel can take evidence from the employee and the members of the appraisal team.

The employee can be assisted at any stage of this appeal procedure, including initial discussion with the appraiser and at an appeals panel, by a union representative or a representative of his or her choice.

The employee should be informed promptly and in writing of the appeal panel's decision.

The decision of the appeals panel is final.