

PYTCHELEY PARISH COUNCIL

APPRAISAL SCHEME

1. Purpose of the Scheme

The Pytchley Parish Council Appraisal Scheme is designed to promote improvement and development by reviewing past performance and goals achieved and looking ahead to set achievable objectives.

The Scheme aims to help both staff and the Council to:-

- ensure that staff are clear about the Council's aims and objectives and the part you are expected to play in achieving them;
 - review performance over the past year, discuss strengths and weaknesses and find ways of resolving any problems that may have arisen in the job;
- agree key tasks and performance objectives for the next year and an action plan for the year ahead including any personal and technical training or development needs; and
- regularly review progress.

The appraisal scheme centres around the annual appraisal meeting which formally assesses and records staff performance, potential and development needs and facilitates a review of work content and volume, the achievements of the past year and joint agreement of objectives for the following year.

Appraisal should be seen therefore in a positive light as a way of the Council helping staff development whilst enhancing their contribution to the Council's success. Staff can and should therefore be open and frank in their approach and participation in the review process.

2. Objectives and Benefits of the Scheme

The objectives of the appraisal scheme are:-

- **Service Quality** – to enhance the quality of service delivery by the Council through regularly reviewing performance and encouraging staff to achieve high standards of performance against clear achievable objectives.
- **Performance Review** – to give staff and the Council an opportunity to discuss how well they are performing and to see what sort of improvements can be made or how strengths can be built on to enable more effective performance.
- **Review of Training and Development Needs** – to enable staff and the Council to predict the level and type of work that will be required to do in the future and determine how they can be best developed for their career and to maximise the contribution to the Council. One of the outcomes from the appraisal may be a development plan that sets out what training the individual should undertake to enhance their performance in role or to develop skills and knowledge for the future.

The benefits of the appraisal scheme may be defined as follows:-

(a) for the staff member it serves to:-

- provide clarification of job purpose and role
- provide recognition of commitment to work and the Parish Council
- review objectives and receive recognition for achievements
- agree priorities
- receive constructive feedback
- identify and resolve any problem areas or weaknesses
- improve job performance and communication
- identify and agree future training needs and development plans.

(b) for the Council it serves to:-

- provide a formal vehicle through which to monitor work
- identify any performance problems
- improve communication
- jointly formulate solutions to problems
- provide positive feedback and recognition
- motivate and provide career development advice.

3. Appraisal Process

The appraisal scheme is made up of five key elements, namely

- self assessment
- an annual appraisal meeting
- jointly agreed tasks, objectives and training and development activities for the next year
- a 12-monthly review and discussion of progress
- an ongoing link between the outcomes and benefits of the Scheme and the Council's corporate aims and objectives.

The whole process and in particular the new objectives and training and development plans will derive and flow from the objectives that have been previously set and the Council's ongoing corporate objectives, values, standards and priorities.

4. Appraisal Meeting

The appraisal meeting will take place annually in accordance with the Scheme schedule and be conducted with the appropriate manager (the appraiser) on behalf of the Council who will report on the outcome of the appraisal, as appropriate, to the Council.

In preparation for the appraisal meeting, the staff member (the appraisee) must complete the self-assessment included in Section 2 of the Appraisal Review Form and some key issues to be considered in particular are:-

- what has been achieved over the past twelve months and what benefit and/or contribution has been made to the business;
- how the job could have been performed better - thinking of the things which might have been done more efficiently or effectively i.e. what could have been done to improve performance;
- the most important personal and technical skills used or needed in the job;
- whether the current skill range and level is appropriate to the job or could the job be done better if further knowledge, skills and training were developed;

- whether any relevant skill, knowledge or expertise which is not now being used in the job but could be used;
- what obstacles have arisen during the last year that got in the way of performing the job as might have been wished;
- whether, and in what ways, more support and guidance to resolve such issues, develop skills or change things to enable the job to be done even better are needed;
- whether there are any matters outside of work that are affecting performance;
- what are seen as the main job tasks and priorities over the next year; and
- what training and other personal development needs exist or are desired.

The appraisee should give due emphasis in the above to the spread of tasks that they have to perform and where relevant consider examples of work issues (positive and negative) in support of the responses to ensure that there will be an open and constructive discussion at the appraisal meeting.

5. Structure and Format of the Appraisal Meeting

All appraisal meetings must be 'open' and 'two way' which means that the appraisee will be expected to contribute fully to the discussion and take the opportunity to comment on, for example, the level and type of support received from the Council.

The appraisal meeting will be structured as follows:-

(a) Introduction

The purpose, scope and format of the appraisal meeting will be explained by the manager.

(b) Self Assessment

Prior to the appraisal meeting the appraisee will have reviewed their performance over the past year and be able to comment on:-

- what went well during the year
- how far you met the objectives for the year
- what, of particular note, did you achieve during the year
- what did you enjoy most/least in respect of the work undertaken
- what did you consider to be your key strengths and weaknesses
- what additional support do you require from the Council
- any outstanding performance problems that require attention

completed Section 2 of the Self-Assessment Form and submitted it at least two weeks before the date of the appraisal meeting to their manager.

(c) Job Review, Key Tasks and Objectives

The appraisee's job description will be jointly reviewed and any necessary changes agreed as part of the meeting and the opportunity should be taken to clarify any tasks of which they are unsure or might like to lose.

In addition the previous year's objectives will be reviewed and the achievements or failures identified along with the reasons behind them.

(d) Feedback on Performance

Feedback on performance during the year will be given by the manager which will include any significant achievements, strengths and, where relevant, any weaknesses that have prevented the completion of objectives. Where agreed weaknesses are identified, solutions or steps that can be taken to overcome barriers to more effective performance will be agreed.

The feedback will be factual, supportive, honest and constructive. At the end of the feedback the member of staff will be given an opportunity to comment and record any mitigating circumstances or obstacles that have prevented them from completing key tasks or objectives. An opportunity will also be taken to identify how the Council can better support and help you realise your potential and performance.

(e) Training and Development

Any training and the development needs will be discussed in respect of both the existing job and the future needs of the Council. Development opportunities may include training, work experience and new responsibilities.

(f) Future Targets and Objectives

A new set of objectives or key tasks will be jointly agreed for the following appraisal year which will be:-

- understandable
- achievable
- measurable
- timetabled
- prioritised
- challenging; and
- limited in number.

(g) Conclusion of Meeting

The appraisee should have an opportunity to ask any further questions at the end of the meeting and the key outcomes of the meeting will be summarised to ensure that there is common understanding of the objectives and the action points.

6. After the Appraisal Meeting

Shortly after the meeting, the main outcomes of the meeting and the agreed objectives and tasks for the following year will be summarised in writing in Section 3 of the Appraisal Review Form and a copy given to the post holder for agreement. The Plan will be signed off by both parties and a copy of the form given to the appraisee whilst the original is held on the Personnel File.

The member of staff and the manager and/or the Council will be responsible for ensuring that the agreed tasks are implemented, training is provided and objectives are then met during the following review period.

Progress on these points may be discussed or reviewed at informal, one to one meetings during the course of the year but progress on the agreed tasks and objectives set will be formally reviewed after six months.

7. Conclusion

Any questions on the above or the Scheme in general should be addressed to the Pytchley Parish Council Chairman.

Adopted 01 02 2021 – Review date January 2023

PYTCHLEY PARISH COUNCIL

APPRAISAL SCHEME ACTION PLAN

The following action plan schedules the steps involved in the annual Appraisal Scheme process and who is responsible within the Council.

STAGE	ACTION	PERSON(S) RESPONSIBLE	TIME FRAME
Stage 1	Review and update Parish Council aims, objectives and business plan	Council with input from Clerk to the Council	Ongoing
Stage 2	Arrange appraisal meetings	Chairman of the Council	January
Stage 3	Issue Scheme details, action plan schedule and Appraisal Review Forms	Chairman of the Council	December
Stage 4	Complete self-assessment in Section 2 of Appraisal Review Form	Each member of staff	By January
Stage 5	Hold appraisal meetings and agree objectives, development plan and sign off in Section 3 and 4 of Appraisal Review Form	Manager, Clerk to the Council or Chairman of the Council as appropriate with staff member	January
Stage 6	Implementation of objectives and development plan	Staff member with manager, Clerk to the Council or Chairman of the Council as appropriate	By March