



## APPRAISAL AND REVIEW POLICY

### WRITTEN BY:

Mrs Sarah Haydon, Chief Officer

### REVIEWED:

March 2022

### APPROVAL DATE:

Finance Strategy & Management Committee – 22 March 2022

Town Council – 12 April 2022

### REVIEW DATE:

March 2024

## INTRODUCTION

1.1 The Appraisal and Review Policy covers all employees of Biddulph Town Council.

Formal appraisals are completed on an annual basis. Throughout the course of the year, staff development and performance is managed by the Chief Officer and the Finance Strategy and Management Committee.

1.2 It is important that each member of staff is clear about what is expected of them in achieving their objectives, from the beginning of their employment.

Appraisals give individuals and the Chief Officer an opportunity to review performance, agree personal objectives and learning and development requirements, which will help to achieve objectives.

Each member of staff will have individual objectives that will contribute to the agreed objectives identified by the Town Council.

1.3 Employees will be fully informed about how the procedure will work and how it will affect them. New employees will be informed about the as part of their induction and probationary period and will receive training in its use.

1.4 Managers must not 'store up' issues to raise at the appraisal – the correct time to give praise or to deal with issues is at the time they occur or as part of regular reviews.

If there are any disagreements over the accuracy or fairness within the appraisal meeting, these should be resolved informally where possible. Employees may use the **Grievance and Dignity at Work Policy** if the disagreement is not resolved.

## OBJECTIVES OF THE POLICY

2.1 The purpose of this policy is to ensure that the Town Council has a clear, consistent and fair approach to appraisal and review.

2.2 The purpose of the appraisal is to:

- give and receive feedback
- review objectives set at the last appraisal meeting
- agree any additional objectives

identify development and training needs and opportunities.

2.3 This policy aims to create a performance management framework to ensure that all employees:

- have an annual face-to-face appraisal meeting
- receive regular meetings with their line manager to discuss their performance during the year and discuss work activity, learning and development
- know what is expected of them in terms of the standard of their performance from the beginning of their employment
- will have an initial appraisal shortly after starting their employment or new post
- are made aware of any poor performance areas in their work

receive recognition for their achievements

2.4 Formal disciplinary and grievance issues are dealt with separately. Management of these issues is dealt with via the **Managing Under-Performance and Disciplinary Action Policy**.

## PROVISIONS

### 3.1 APPRAISALS

#### General Principles

All employees will take part in a formal annual appraisal process using the document included at the end of this policy.

Feedback given should be clear, honest, helpful and constructive.

It should be based on:

- behaviour rather than personality
- observation rather than inferences
- description not judgment
- specifics rather than generalisations
- facts not unsupported opinions
- suggestions for improvement which can be achieved.

#### Objective Setting

- Objectives set will be in line with the responsibility level and scope of work outlined in the appraisee's current, up-to-date job description.
- Significant changes to objectives and action plans should be discussed with the individual employee and confirmed as and when they arise.
- Performance against objectives, targets and values should be assessed by objective evidence wherever possible and both appraiser and appraisee share the responsibility for monitoring progress on the agreed objectives.
- **Councillors may play a role in identifying possible appraisal objectives for the Chief Officer. These items should be submitted for consideration to the Chair of the Finance Strategy and Management Committee on an annual basis.**

#### Recording

- All appraisal meetings will be recorded, including the date and outcome of all appraisal meetings.
- The appraiser and appraisee will agree the written record is accurate. This should be completed within 5 working days of the appraisal meeting.

## **Support**

Appraisers will ensure that they ask the appraisee if they need any additional support or equipment in order to perform their role effectively. This may be ICT equipment, flexible working arrangements or whether any reasonable adjustments made to support a disability are still appropriate.

## **Assessment**

All appraisees will be assessed against their objectives.

The Chief Officer will demonstrate consistency of assessment across their team.

Before each appraisal meeting the appraiser and the appraisee will need to reflect on:

- The work the appraisee has been involved in including what has gone well, what has gone less well and what the next steps should be.
- Future demands and service plans.
- Any new objectives that might be appropriate.
- Possible development needs and skills and knowledge which are specific to the post.
- Career aspirations and opportunities.

Employees should be given every opportunity to give their opinion about their achievements and their performance at work and there should be joint discussion at the meeting.

## **3.2 REGULAR REVIEW**

All employees meet regularly with the Chief Officer. This is an informal process.

Typical questions for consideration at these meetings could be:

- What is going well?
- What has gone less well?
- What has the employee learned?
- What is helping?
- What is hindering?
- How can colleagues further support the individual?

### **3.3 KEY RESPONSIBILITIES**

#### **All Staff**

Refusal to participate in an appraisal will be considered to be a disciplinary matter and should be dealt with through the **Managing Under-Performance and Disciplinary Action Policy**.

#### **Chief Officer**

- Ensure that each member of staff has an individual appraisal at least once every 12 months.
- Ensure that each member of staff has an up to date job description / person specification.
- To inform the Finance Strategy and Management Committee of the date of when an appraisal discussion has taken place.
- To meet regularly with staff, either individually and/or as a team in between appraisal meetings.
- Writing and maintaining the Appraisal and Review Policy.

### **3.4 NEW EMPLOYEES AND LONG-TERM ABSENCE**

#### **Under one year's service (including temporary and fixed term contracts)**

All employees will receive objectives and review through appraisal meetings which are appropriate to the length of their employment.

#### **Long term absences including maternity leave**

If employees are absent during an appraisal year, objectives and timescales should be reviewed to accommodate the absence where possible. Absences due to a disability or maternity should not affect the overall outcome of the appraisal.

## ANNUAL PERFORMANCE APPRAISAL FORM

Name		Position	
Managers Name		Length of Service	
Date Appraisal Completed			
1. Has the last year been good/ bad/ satisfactory? Please give reasons for your answer.			
2. What do you consider to be your most important achievements of the past year?			

3. What elements do you find most challenging about your role?

4. What elements of the job interest you most?

5. What do you consider to be the most important aims and tasks for the next year?

These should be agreed between the staff member and Chief Officer.

*(These should be reviewed each year when considering achievements in 2.)*

6. What sort of training/experiences would benefit you in the next year?

7. Are there any other considerations that should be discussed as part of this appraisal process?

(Consider ICT equipment, flexible working arrangements or whether any reasonable adjustments made to support a disability are still appropriate.

An annual review of workspaces and a workplace assessment will be completed as part of this process)