

# STAFF APPRAISAL POLICY

Adopted 28<sup>th</sup> May 2026

Review date 28<sup>th</sup> May 2029

Willoughton Parish Council are committed to enhancing individual performance and potential of staff and will provide the necessary feedback, support, and arrange training to ensure that high standards of performance are maintained throughout the organisation.

This policy sets out the procedure for the appraisal of the Clerk/RFO (and any other employees of the Council, where applicable).

The purpose of the appraisal process is to:

- a) Support continuous professional development.
- b) Review performance against agreed objectives.
- c) Identify training and development needs.
- d) Provide an opportunity for structured two-way feedback.
- e) Ensure alignment with the Council's objectives and statutory responsibilities.

The appraisal process is intended to be supportive and developmental, not disciplinary. Staff appraisals must not exist in isolation but should be part of an ongoing process in which both the Council and the Clerk/RFO have a shared responsibility. An appraisal is a formal event happening each year, but there should be several regular, informal conversations between members of the staffing committee and employee in the interim.

This policy applies to:

- a) The Clerk/RFO.
- b) Any other employees of the Parish Council (where applicable).

For the Clerk/RFO, the appraisal will be conducted by the Chair of the Personnel and Disciplinary Committee and one other committee member.

## Frequency of Appraisals

- a) A full appraisal will take place annually.
- b) Additional review meetings may be arranged where necessary.

## The Appraisal Panel

The appointed panel will:

- a) Arrange the appraisal meeting.
- b) Review performance against agreed objectives.
- c) Agree new objectives for the forthcoming year.
- d) Identify training and development needs.
- e) Make recommendations (where appropriate) regarding salary increments in line with the Clerk/RFO's contract to Full Council.

The Clerk will:

- a) Prepare a self-assessment in advance of the meeting.
- b) Provide evidence of achievements and challenges.
- c) Identify training and development needs.
- d) Engage constructively in the appraisal discussion.

## **The Appraisal Process**

At least two weeks before the meeting:

- a) The Clerk/RFO will complete a self-assessment form.
- b) The Appraisal Panel will review:
  1. The previous year's objectives.
  2. Key projects and achievements.
  3. Council priorities.
  4. Any feedback received during the year.

## **The Appraisal Meeting**

The meeting will include:

- a) Review of the previous year's objectives.
- b) Discussion of key achievements.
- c) Consideration of any challenges encountered.
- d) Review of workload and support.
- e) Identification of training and development needs.
- f) Agreement of SMART objectives for the coming year.

The discussion should be open, constructive, and confidential.

Objectives should:

- a) Be Specific, Measurable, Achievable, Relevant and Time-bound (SMART).
- b) Reflect the Council's strategic priorities.
- c) Include professional development goals.
- d) Be realistic in relation to working hours and resources.

## **Training and Development**

The Council recognises its responsibility to support the Clerk/RFO in maintaining and developing professional competence.

This may include:

- a) Attendance at training courses.
- b) Membership of professional bodies such as the Society of Local Council Clerks (SLCC.)
- c) Support toward qualifications (e.g. CiLCA).
- d) Attendance at relevant conferences and seminars.

Training needs identified during appraisal will be considered by the Council and reflected in the budget-setting process.

## **Confidentiality**

- a) The appraisal record will be confidential to the Clerk/RFO and the Appraisal Panel.
- b) A summary report confirming that the appraisal has taken place may be reported to Full Council, without disclosing confidential details.
- c) Documentation will be stored securely in accordance with data protection legislation.

Where performance concerns arise that cannot be resolved through appraisal, the Council's formal procedures will apply.