



## **ST CUTHBERT (OUT) PARISH COUNCIL STAFF APPRAISAL POLICY**

There should be annual staff appraisals [following a 6 month from appointment review] with the following objectives:

- Assessment of past performance and the improvement of future performance
- Assessment of future potential
- Assessment of training and development needs.

Appraisals should be a light touch appraisal with an agenda that would compare performance with job description.

Appraisals should not introduce any new items that have not been previously discussed, eg disciplinary matters.

The Clerk should appraise any staff members [and the Staffing Committee will make final decisions regarding completion of probation]

The Council will appoint two councillors to carry out the Clerk's annual appraisal in April each year.

The appraisal reports should be signed and agreed by both parties and filed in the staff files.

A report should be given to the Full Council stating that the appraisals have been carried out, along with any recommendations.

The [ACAS] appraisal form will also be used as the basis for probationary reviews. The appraisal form is below.

This policy to be next Reviewed in October 2025.

# Appraisal form

Use this model form to record the issues discussed at an employee's performance appraisal meeting.

Employee's name:	XXXXXXXXXXXXXXXXXX
Job title:	XXXXXXXXXXXXXXXXXX
Department:	
Date of engagement:	XXXXXXXXXXXXXXXXXX
Manager:	XXXXXXXXXXXXXXXXXX
Date of meeting:	XXXXXXXXXXXXXXXXXX
<b>Current performance</b>	
<b>Objective/competence 1: XXXXXXXXXXXXXXXXXXXXXXXXXXXXX</b>	
This section should be used to record discussion on the key areas of the job, and include a summary of achievement against the objectives that have been previously agreed.	
Employee:	
Line Manager:	
Achievements:	
Proposed developments:	
<b>Objective/competence 2: XXXXXXXXXXXXXXXXXXXXXXXXXXXXX</b>	
Employee:	
Line Manager:	
Achievements:	
Proposed developments:	
<b>Objective/competence 3: XXXXXXXXXXXXXXXXXXXXXXXXXXXXX</b>	
Employee:	

Line Manager:

Achievements:

Proposed developments:

**Objective/competence 4: XXXXXXXXXXXXXXXXXXXXXXXX**

Employee:

Line Manager:

Achievements:

Proposed developments:

**Objective/competence 5: XXXXXXXXXXXXXXXXXXXXXXXX**

Employee:

Line Manager:

Achievements:

Proposed developments:

**Development summary:**

*This section should be used to record any areas of the employee's work where further training and support is required, and any areas where performance is particularly strong and should be developed further.*

Line Manager:

Further support & training:

Strong performance & development:

**Development and training**

*This section should list specific requirements for any training or development. These activities are not restricted to training courses, and may include 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 to develop him/her further.*

<p><b>Career planning</b></p> <p><i>This section should record any areas of the department or Company in which the employee has expressed a specific interest.</i></p>	
<p><b>Other areas of discussion</b></p> <p><i>This section should record any other points raised at the appraisal meeting.</i></p>	
<p>Health &amp; Safety considerations</p> <p>Working from home environment, welfare &amp; wellbeing</p> <p>Practical issues</p>	
<p><b>Assessment Level</b></p> <p>This is based on performance over the year against objectives achieved</p>	
<p><b>Outstanding performance</b></p> <p><i>(Objectives exceeded and competencies more than fully demonstrated)</i></p>	
<p><b>Standard performance</b></p> <p><i>(Objectives met and competencies fully demonstrated at required levels)</i></p>	
<p><b>Less than standard performance with development needs</b></p> <p><i>(Most objectives met but development required to fully meet all objectives)</i></p>	
<p><b>Unsatisfactory performance</b></p> <p><i>(Performance unacceptable; objectives not met and competencies not demonstrated)</i></p>	

Employee's signature:	
Appraiser's signature:	
Date:	
Reviewing manager's signature:	
Date:	
One copy of this completed form will be kept by the appraiser, one by the appraisee and one in the employee's personnel file.	

# SELF APPRAISAL FORM

Name .....

Department .....

Date of appraisal \_\_/\_\_/\_\_

Your next Appraisal Meeting will take place on:

Date: \_\_/\_\_/\_\_

Time: xx:xx

Place .....

## ***Purpose of the Appraisal 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

**Name .....**

1. Circle 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 which were made 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?

.....

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

.....

7. Additional remarks, notes, questions, or suggestions

.....





## EMPLOYEE ACTION PLAN

<b>Employee name</b>		<b>Managers name</b>	
<b>Role title</b>		<b>Role title</b>	
<b>Organisation:</b>	St Cuthbert (Out) Parish Council	<b>Date</b>	

	<b>Performance area</b>	<b>Expected improvement actions/performance</b>	<b>Support &amp; dependencies</b>	<b>Due date</b>
	<i>Detail specific area where performance standards could be developed further. Examples should be provided.</i>	<i>Detail what actions need to be taken/outcomes need to be delivered to achieve this</i>	<i>Detail what support will be provided &amp; if any dependencies</i>	
<b>1</b>				
<b>2</b>				
<b>3</b>				
<b>4</b>				
<b>5</b>				

<b>+</b>	Employee signature	Date
	Manager signature	Date