

Roz Barnett

Saxmundham Town Council

Staffing Sub- Committee Pack 26 July 2021



**SAXMUNDHAM APPRAISAL SCHEME**

**INTRODUCTION**

The appraisal scheme provides the Council with a framework to regularly review an employee’s performance, and the employees with an opportunity to give feedback to their employer.

The Resources Committee have the oversight of the Appraisal Scheme process and ensuring that it is completed.

**WHO UNDERTAKE APPRAISALS?**

The Town Clerk is responsible for the staff performance management meetings and appraisals of all staff.

The Staffing Committee are responsible for the performance management and appraising the Town Clerk.

The Chair of the Staffing Committee and the Chair of the Council are responsible for setting the priorities in consultation with the Town Clerk at the beginning of each financial year.

Summary reports from all appraisals will be shared with the Resources Committee.

**CORE ASPECTS OF THE PERFORMANCE MANAGEMENT PROCESS**

**The Council’s Annual Plan**

The Council’s Annual Plan should set out the Council’s priorities and key areas of work for completion. The plan priorities should then be reflected in the performance management targets for staff.

**The Role of the Staffing Committee (See Staffing Committee Terms of Reference)**

The Staffing Committee will:

· ensure that annual appraisals are being conducted for all staff;

· organise the process for the Town Clerk’s appraisal;

· be responsible for reviewing the performance management process to ensure it continues to meet the Council’s needs;

· will countersign the appraisals for all staff; and

· will hear any grievances raised by staff in relation to their appraisal. (subject to compliance with the ACAS Code of Practice on the conduct of grievance procedures).

**The Annual Appraisal and Mid-Year Review**

The annual appraisal and mid-year reviews and catch-up meetings will follow the format set out in this document with supporting forms for the annual and mid-year reviews.

**The Role of Regular Catch-Ups**

Catch-ups should be conducted every six weeks or so. Meetings may be more frequent where staff are new to their post, the employee requires more regular support or the manager is concerned that the employee needs particular attention. Equally catch-ups can take place less frequently where appropriate. However, they should always take place at least every 8 weeks/2 months. Catch-ups provide the opportunity for regular discussions on progress against objectives highlighting where additional support may be needed or, in exceptional situations, where objectives should be amended. They also provide an opportunity to discuss a range of other day to day matters such as annual leave or TOIL arrangements; recent or planned absence; workload pressures; progress with learning and development plans etc.

**STRUCTURE OF THE APPRAISAL MEETING AND MID-YEAR REVIEW**

The appraisal meeting and mid-year reviews are in two parts. The first part looks back over the appraisal period. It looks at:

· the extent to which the objectives have been met;

· noting any achievements

· whether the job description has changed;

· whether the learning and development objectives have been achieved; as well as

· noting any other general comments.

The second part looks forward to the next appraisal period. It provides an opportunity to:

· discuss the objectives to be set;

· identify the learning and development needs.

**USING THE RECORD OF APPRAISAL FORM**

The form is produced as a Word document to allow flexibility. The form is not intended to restrict the amount which can be written or the number of objectives which can be set (The form Is an ACAS template).

**SETTING OBJECTIVES**

All team and individual objectives should be written as SMART objectives. The number of objectives set will depend on the ‘size’ of each objective and the other work which a member if staff is tasked with. If appropriate objectives should have supporting information such as ‘milestones’ to be achieved or additional information to clarify how the objective should be met or what support might be available.

**RECORD KEEPING**

A written record of the appraisal, mid-year review and catch-up meetings will be given to the employee for their own records and copies will be kept in the employee’s personnel file. The written record of appraisal, mid-year review and, catch-up meetings for the Town Clerk will be held by the Chairman of the Staffing Sub-Committee on behalf of the Committee, as well as in the Town Clerk’s own personnel file and a copy given to him/her. Should the Chairman of Staffing Committee change then these records will be made available to them, and any other member of the Staffing Committee appointed to conduct an appraisal meeting (either full or mid-year)

**SEEKING AGREEMENT**

Wherever possible agreement should be sought for the objectives set. It is important for the appraiser to listen carefully to any concerns raised by the ‘appraisee.’ However, if agreement cannot be reached then the disputed objectives can be referred to the Staffing Committee who will consider whether to amend, withdraw, or retain them after having considered the matter. Wherever possible, agreement should be sought for the other aspects of the appraisal (i.e. looking back at past achievements, training required, etc.). However, where agreement cannot be reached a note of the employee’s comments/objections will be kept together with the appraisal report.

**THE RELATIONSHIP BETWEEN THE TOWN CLERK’S APPRAISAL AND THE APPRAISALS OF OTHER STAFF**

For clarity, the Town Clerk appraisal process is entirely independent from that of other members of staff. In other words, if for any reason any stage of the Town Clerk’s appraisal is delayed in full or in part - then this should not delay any element of the (including objective setting) appraisal process progressing for any other member of staff.