



LLANNON COMMUNITY COUNCIL

PERFORMANCE REVIEW POLICY & PROCEDURE

ADOPTED: 10th August 2022

REVIEW DATE: May 2023

Llannon Community Council **Performance Review Policy and Procedure**

Policy

The Council's policy is that all employees will be appraised annually.

The summary of this appraisal should be a fair representation of the dialogue and is to be referred to as a working document throughout the forthcoming year.

The benefits of appraisal in terms of improved communication and enhanced performance both for employees and for the Council will only be achieved by the continuous commitment of all those involved in the scheme.

The Council's appraisal scheme has been designed to meet the following objectives:

- To assist employees in performing their jobs to the best of their ability, maximising their job satisfaction and their contribution to the Council's objectives.
- To identify individual training and development needs.
- To highlight the potential for employees to develop within their role.

Procedure

The Appraisal interview will occur annually and be completed by 31st May or the first reasonable date thereafter.

The Appraisal interview will be carried out by the employee's line manager on a one-to-one basis. (The Council may decide to arrange training in the implementation of this scheme from an external source).

The appended documentation will be used for the purpose of conducting the appraisal.

The appraiser will then arrange the date, time and location of the appraisal meeting, fill in the details at the top of the Self-Appraisal and Interview Report form and notify the Clerk. (The Clerk will notify employees for whom he/she will undertake the appraisal).

Employees will be given the Self-Appraisal Notes for their completion. At least ten working days should be given to enable employees to adequately prepare for the interview. This must be returned to the line manager within three days of the date of the appraisal.

The following chart represents the sequence of events followed by the appraiser regarding the three stages of the appraisal process:

The Appraiser	
Preparation	
Gathers	Relevant documentation including the objectives set for employees for the year under consideration.
Completes	The objectives/targets/achieved and skills gained/further development undertaken (where known) under Section A of the Interview Report Form.
Makes notes on	All other sections
The interview	
Asks for the employee's comments	On their own performance based on the Self-Appraisal Notes
Discusses with the employees and seeks to agree conclusions	On all sections of the Interview Report Form
Completes	All sections and asks the employee to make general comments as well as sign and date the form
Summarises	Own general comments and signs and dates the form
Follow-up	
Keep notes	Of the follow-up actions required to facilitate the achievement of objectives/targets and/or general training and development needs
Retains on File	The Interview Report Form duly signed and all related documentation.
Ensures	Follow-up action takes place as appropriate

- The completed Interview Report Form will be viewed as a working document and will be continually referred to and reviewed during the year. Where the objectives/targets agreed at the appraisal interview have changed, new objectives/targets should be agreed with the employee.

Footnote: As the Clerk is accountable to the Council as a whole, the Chair of the Council must be the appraiser of the Clerk (in the event of their absence, this should be the Chair of Personnel). The Chair will report back to the Council with the outcome of the annual appraisal process and related recommendations. No documentation used for the appraisal process must be kept confidential and should not be shared with the whole of the Council.

APPENDIX A

Appraisal Interview report

Name of Employee: Date Appointed: Job Title: Name of Appraiser: Date of this Appraisal Name of Appraiser's Line Manager Date of last Appraisal:

Section A

Performance review

Objectives and targets agreed for review period

List the objectives and targets agreed at the last appraisal interview (where these have changed, new objectives/targets should have been agreed to reflect changes in circumstances). Comment on how effectively the objectives have been achieved over the review period.

Objectives/Targets (including agreed dates for achievement)	Achieved ? Fully (F) Partially (P) Not (N)	Comments

Skills gained and further development undertaken since last appraisal interview

Note any training attended, both internal and external:

New skills gained (whether as part of a course or not):

Qualifications gained:

Section B

Performance Indicators

The appraiser to describe the employee's job performance during the review period. A rating scale from A–E on each performance indicator is to be used as follows:

- A = EXCELLENT
- B = GOOD
- C = SATISFACTORY
- D = UNSATISFACTORY
- E = CAUSE FOR CONCERN

Where a performance indicator is not relevant, it will be deleted.

Performance indicator	Rating and Comments
Team Working	
Relationships with Councillors/Other staff	
Relationships with members of the public (internal and external)	
Leadership in role	
Ability to meet performance standards	
Adaptability	
Self-development	
Impact on the work of the Council	

Section C

The future

Objectives for the coming review period

Taking into account the Council's objectives agree a new list of personal objectives/targets for the next 12 months.

[Note: carry forward any unachieved objectives/targets from the last review period, if still relevant.]

Objectives/Targets (Minimum of 3, maximum of 5)	Date for achievement

Section D

Training and development needs

As a result of the foregoing discussion, note here any training requirements. These can be:

- on-the-job training
- external courses which may or may not lead to a qualification
- any other professional development.

Topic	Type of training/development recommended

Section E

Comments and Signatures

Clerk's/Employee's comments

Appraiser's comments

Please sign below to confirm that the appraisal interview has taken place:

Clerk's/Employee's signature:

Date: [insert date]

Appraiser's signature:

Date: [insert date]

Appraiser's manager's signature:

Date: [insert date]

APPENDIX B

Self-appraisal

Name:
Job Title:
Date of Interview:
Time:

The questions listed below are to aid your preparation for the appraisal by helping you to focus on your current job responsibilities, the skills required to meet those responsibilities, what your strengths are and the areas in which you could improve.

You should complete the form and return it to your line manager three days' prior to your scheduled appraisal.

This form is structured so that it mirrors the Interview Report Form, which will be completed by your appraiser during the interview but only after a joint discussion of each section.

Performance Review

Looking back over the review period (usually the last 12 months):

- How far have you met previously agreed objectives/targets?

- What factors have helped or hindered your achievement of those objectives/targets? Consider internal factors such as your personal strengths and weaknesses and external factors such as policies, systems and other people.

- List any training you have undertaken, or new skills and/or qualifications gained. What can you do now that you could not do a year ago?

Performance Indicators

Your appraiser will be using the following performance indicators to describe your job performance during the review period. You will be rated from A–E on each performance indicator as follows:

- A = EXCELLENT
- B = GOOD
- C = SATISFACTORY
- D = UNSATISFACTORY
- E = CAUSE FOR CONCERN

Where a performance indicator is not relevant, it will be deleted. In preparing for the interview, you should enter comments in the spaces provided. Think of examples that demonstrate your abilities or need for improvement under each heading.

Performance indicator	Comments
Team Working	
Relationship with Councillors/Other staff	
Relationships with members of the public (internal and external)	
Leadership	
Ability to meet performance standards	
Adaptability	
Self-development	
Impact on the work of the Council	

Objectives/targets

One of the main purposes of the appraisal interview is for you to agree with your appraiser your objectives/targets for the next 12 months. Bearing in mind the overall objectives of the Community Council, jot down your thoughts on suitable individual objectives and/or targets in the space provided below. Also decide upon realistic deadlines.

Do not worry if you find it difficult to identify suitable objectives/targets for the forthcoming year as you will be able to discuss these in detail with your appraiser at the interview.

Training and development needs

Taking into account all of the above, how do you feel your performance could be improved? Consider on-the-job training, in-house training sessions, external courses, secondment, other professional development, etc.

Finally

If you are unhappy about any aspect of the appraisal interview you should make appropriate comments on the Interview Report Form, which will be completed by the Appraiser during the interview.