

Council Appraisal Policy

YLCA advises all councils to adopt an appraisals policy which reflects the guidance of this Advice Note. It is sensible that a copy of the policy is given to all employees as part of their induction.

A template policy is below:

Skeeby Parish Council

APPRAISAL POLICY

[Adopted: 24.09.2026]

[Review: May 2027]

The Council undertakes appraisals with all staff on a regular basis (at least annually). The purpose of appraisals is to monitor and evaluate staff performance and development at an individual level as part of the Council's normal managerial function. The review enables the Council to:

- Consistently measure individual performance against departmental/organisational objectives
- Focus staff performance on organisational objectives
- Encourage continuous improvement

The Council's policy is that each member of staff will attend an annual review meeting to evaluate their performance and development, based on an exchange of views between the individual and their line management, which is either the full council or a staffing committee (a committee is recommended for all councils). At the end of the review meeting, staff should have an agreed individual action plan (with targets and timescales), and where appropriate an individual training plan (with objectives and resources). The plans will be referred to as working documents throughout the year and will be updated accordingly.

Why appraisals are important

The system of appraisal will provide the means for the council and its employee(s) to jointly review their performance and in doing so it will:

- help improve an employee's future job performance by identifying strengths and weaknesses, and determining how to best utilise strengths and overcome weaknesses
- help reveal and resolve problems which may be restricting an employee's progress and causing inefficient work practices
- encourage regular open and honest dialogue between the council and its employee(s) about their work performance, which will result in improved communications and clearer direction
- develop a greater degree of consistency by ensuring that the council and its employee(s) meet formally and regularly to discuss performance and potential
- assist succession planning and determine desire and suitability of employees for promotion
- identify ways in which individual health and wellbeing can be supported and developed, to enable an employee to reach their full potential.

The purpose of the appraisal scheme is to:

- ensure an understanding and awareness of the individual/council objectives and the barriers preventing their achievement
- develop knowledge and agreement of what is expected of individuals and how their contribution fits into the work of the council
- review the individual's performance, giving a formal opportunity to discuss progress, identify improvements, and build on strengths

- review potential development needs and predict the employee's future capabilities and how these can be developed
- review progression and assess the employee's eligibility and desire to achieve promotion
- develop individuals so that job satisfaction and job performance is maximised, thus increasing effectiveness and efficiency resulting in the provision of an improved service for the community
- ensure that the council uses its workforce in the most effective way.
- raise awareness of the importance of self-care, and how this can support overall development and progression goals.

Objectives

An important factor in the appraisal process is the development and maintenance of an open relationship between the council and the employee. Questions are asked in the process to identify strengths and weaknesses, and determine objectives:

Once this discussion has taken place, it will be necessary to determine:

- Achievement or non-achievement of their current targets.
- Agreement on their future targets.
- Define an action plan setting further targets.

The discussion that takes place between the council and its employee during the appraisal is the scheme's central and most important part.

The Appraisal System has been designed to meet the following specific objectives:

- To ensure all job descriptions are current and accurate and that they align to the Council's objectives.
- To ensure staff have clear targets aligned to the objectives, which are time bound, and such targets can be revised/updated as required.
- To ensure that staff have the opportunity to know what performance is expected of them at an individual level and to receive feedback.
- To ensure that staff can discuss training, development and support within their role, in order to fulfil their maximum potential.
- To assist staff in understanding the contribution their role makes in meeting the Council's overall objectives.
- To assist staff in their involvement and participation in the Council's commitment to continuous improvement.

Staffing Committee and Line Management

Skeeby Parish Council has appointed a staffing committee and has set the remit in which it will operate in the form of terms of reference.

The line manager of the Clerk is the Staffing Committee.

The line manager of all other council employees is the Clerk.

The Staffing Committee will appoint a sub-committee of at least two councillors with terms of reference and delegation to appraise the Clerk (remember to write this into the staffing committee terms of reference)

The Clerk will be delegated to carry out the appraisals of other employees on a 1-1 basis.

An overview of the Council's Procedure

Appraisals take place annually.

Appraisals follow a standard format for all members of staff and a report is produced to reflect an accurate summary of the discussion.

New members of staff will be briefed on the Appraisal System as part of their Induction.

Preparation

For the appraisal of the Clerk, the Staffing Committee will start the process by:

- Ensuring that the employee has a copy of all relevant documentation and requests that they read it thoroughly.
- Giving the employee a Preparation for Appraisal Form, asking them to complete it and return it to the Chair of the Staffing Committee within two weeks.
- Giving any further guidance or clarification on any aspect of the appraisal process which they may want.
- Arranging a mutually convenient date, time, and place for the appraisal interview (about four weeks after the Preparation for Appraisal Form is returned).

The Clerk will follow the same procedure for any staff member that they are delegated to appraise.

Interview

An appraisal interview will be conducted, and the Appraisal Form completed. Amendments to the job description can also be discussed at this time and recommendations reported to the Staffing Committee for approval.

The best practice guidance contained in YLCA Advice Note 40 will be followed to achieve confidence in the process.

The appraiser will prepare the form following the interview and ask the employee to sign the final version.

The employee will be given opportunity to make comments about their appraisal on the Appraisal Form if they wish.

The employer and employee will create, or begin to create an Action Plan with targets/objective for the forthcoming year.

A date will be set to review progress and to check that the targets/objectives that have been set are being met. The Staffing Committee will have responsibility for arranging these meetings with the employee.

After the interview

The completed Appraisal Form will be signed by employer and employee. A copy will be given to the employee and a copy will be retained in the employee's personnel file with the preparation for appraisal forms of both parties and any other relevant documentation.

If an employee disagrees with the outcome of the appraisal then they should bring this to the attention of the Staffing Committee and the relevant action should be undertaken by that Committee (this may mean checking information again and or gathering evidence).