



# Cantley with Branton Parish Council

[www.cantleywithbrantonparish.co.uk](http://www.cantleywithbrantonparish.co.uk)

## APPRAISAL AND TRAINING POLICY

### 1. Introduction

1.1 Cantley with Branton Parish Council (“the Council”) recognises our employees are our most valuable asset and are committed to maximising individual performance and potential. The Council will provide necessary feedback, support and training to ensure that high standards of performance are maintained throughout the organisation.

1.2 The appraisal process is an opportunity for people to seek and receive high quality, responsive and balanced feedback on their work performance and an opportunity to identify and plan for future individual learning and development needs.

1.3 The main element of the appraisal process is that there should be no surprises. Staff appraisals must not exist in isolation and should be part of an ongoing process in which both management and staff have a responsibility.

1.4 As a small workforce, informal communications are encouraged and will take place on a daily and/or weekly basis between the Clerk and team, discussing work priorities and objectives. These meetings are not recorded.

1.5 The Clerk is responsible for ensuring the policy is followed and for giving employees constructive, timely and honest appraisals of their performance, which should take into account both Council and individual aims. The Clerk will ensure the timetable is adhered to and the process is monitored effectively. Employees are expected to engage with all areas of the policy.

1.6 The Council is committed to the principle of encouraging staff and councillors to enhance their role and qualifications by further training. All sponsored training must relate to the needs of the council, be relevant to an individual’s job role and be subject to council approval as is dependent on the availability of financial resources.

### 2. Appraisal procedure

#### Schedule of appraisals

2.1 The Council supports a minimum of one appraisal discussion a year, which will be recorded, to enable:

- a structured and confidential discussion on work programmes linked to Council objectives;
- the identification of achievements & to raise any concerns;
- effective employee support & guidance;

- discussions about training & development needs and individual aspirations;
- recognition of good performance and reward arrangements.

2.2 Staff on a probationary period will receive an appraisal at 12 weeks employment and a final probationary sign off appraisal at 24 weeks employment. If the staff member is not at a required standard at the 24 week sign off appraisal, the decision may be taken to terminate employment at that point or to extend the probationary period. If the probationary period is extended this will be noted in the employees personnel file. Monthly appraisals will continue until the staff member is signed off from the probationary period.

2.3 Where it is known that an employee is due to commence a long period of absence (e.g. maternity leave) this will be factored into the timescales and where appropriate, an appraisal will be held before the absence starts. Where a member of staff misses a scheduled appraisal meeting due to sickness absence, the meeting will be rearranged to take place following their return.

### **Before the appraisal meeting**

2.4 The appraisal meetings will be carried out annually in March. The Clerk will arrange the meetings and invite employees given at least one week's notice sending the appraisal form to allow the employee time to reflect and prepare for the meeting.

2.5 The Clerk's appraisal will take place first in the annual cycle (conducted by the Chairman of the Council (or Vice Chairman if the Chairman is unavailable) who will liaise with all the Parish Council prior to the appraisal for any feedback), followed by the Handyman. With the exception of the Clerk's appraisal all other appraisals will be undertaken by the Clerk. The Clerk shall liaise with the Parish Council for any feedback prior to the Handyman's appraisal.

2.6 All employees/ Councillors undertaking appraisals will be required to complete appraisal training, arranged by the Clerk, with an external provider before they undertake any appraisal.

2.7 The Appraiser should prepare for the meeting by ensuring they are clear on what is included in the staff member's job description and any previous appraisals completed. They should also be aware of any training the staff member has completed since the last appraisal and any other HR action taken. The Appraiser should also have read the 'Guidance for Appraisers' in Appendix 1.

2.8 The Appraiser should provide the Appraisee with a Staff Self Assessment Form (see Appendix 2) 2 weeks before the meeting. This form should be completed by the staff member and returned to the Appraiser at least 3 clear working days before the meeting.

### **At the appraisal meeting**

2.8 The meeting should be held in a confidential environment that is free from interruption. The appraisal discussion will allow an opportunity for both the employee and Clerk/ Councillor to reflect and comment on the previous year's objectives (linked to the relevant Job Description and Council aims). It will explore what factors have affected individual performance including internal and external constraints and issues. It will praise achievement and encourage the employee in their role.

2.9 The meeting will set objectives for the forthcoming year that are aligned to the aims and objectives of the Council. Objectives should be achievable and realistic taking into account available resources (including time) and should be capable of being monitored.

2.10 Areas for training, development and improvement should be discussed and agreed at the meeting and a plan for implementation including costs and timescales. It is important to be specific in terms of evidencing achievements and development needs. Any comments made by the Appraiser or employee are to be constructive and should not be seen as a criticism.

2.11 If there are disagreements between the parties with regard to the outcomes of the Appraisal HR advice should be sought. Employees may use the grievance procedure in the event of problems over the appraisal meeting.

### **After the Appraisal Meeting**

2.12 Following the appraisal meeting the Clerk or Councillor will complete the Appraisal Form (Appendix 3). The form will be sent to the employee to complete, sign and return with their comments.

2.13 The final version of the Appraisal Form will be signed by the Appraiser, one copy will be sent to the employee and a second copy will be held on the employee's personnel file.

2.14 When all appraisals have been completed a report will be taken to the Parish Council to note the appraisals and agree any action to be taken, if any, in respect of the outcomes from the appraisal.

2.15 The Clerk in conjunction with the Parish Council will ensure any training, development and support requirements identified in the appraisal are considered and implemented.

2.16 Feedback from all employees will be encouraged after the completion of the Appraisal Form.

### **3. General**

3.1 This policy is regarded as non-contractual and does not form part of any contract of employment. Cantley with Branton Parish Council reserves the right to amend, update, include or remove any policies according to the need of the Council's business.

### **4. Implementation**

4.1 All Councillors and Staff have responsibility to ensure this policy is implemented and followed. Failure to do so may result in Disciplinary Action being taken against staff or Councillors being reported to Doncaster Council Monitoring Officer under the Code of Conduct.

### **5. Monitoring**

5.1 The policy will be monitored in the following ways:

<b>Monitoring Activity</b>	<b>Person Responsible</b>
Annual appraisals of all employees to take place in March each year	Chairman of the Parish Council

Training requests responded to within one month of request	Clerk/RFO in relation to budget implications
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## **6. Policy Consultation**

6.1 A copy of the policy has been given to all staff and Councillors.

Dated : 14<sup>th</sup> May 2024

Adopted: 5<sup>th</sup> June 2024

Review: Annually or upon any changes to legislation; or subject to the requirements of Cantley with Branton Parish Council.

### **RELATED POLICIES AND STRATEGIES**

Councillor Code of Conduct

Disciplinary Policy

Grievance Policy

## **Appendix 1 – Guidance for Appraisers**

Prior to the formal appraisal meeting, Appraisers should ensure they are adequately prepared for the appraisal meeting. The appraiser should look at objectives set in previous appraisals and familiarise themselves with any other relevant information concerning the employee which may need to be raised at the appraisal meeting. It is important for the success of the process that appraisals are conducted with an eye on the wider aims and objectives of the Council.

### **Be prepared**

Prepare by referring to a list of agreed objectives and notes on performance throughout the year.

### **Create the right atmosphere**

A successful meeting depends on creating an informal environment in which a full, frank but friendly exchange of views can take place. It is best to start with a general discussion before getting into any detail.

### **Work to a clear structure**

The meeting should be planned to cover all the points identified during preparation with time allowed for individuals to fully express their views.

### **Use positive feedback**

Where possible, appraisers should begin with praise for some specific achievement, but this should be sincere and deserved. Praise helps people to relax; everyone needs encouragement and appreciation.

### **Let the employee do the talking**

This enables them to talk freely and helps them to feel that they are getting a fair hearing. Use open questions to encourage people to be expansive.

### **Invite self-appraisal**

This is to look at how the employee view themselves. It provides a basis for discussion as many individuals underestimate themselves.

### **Performance, not personality**

Always refer to actual events, behaviour and results.

### **Encourage analysis of performance**

Performance should be analysed jointly and objectively why things went well or badly and what can be undertaken to maintain a high standard in the future.

### **Don't deliver unexpected criticisms**

Feedback on performance should be immediate and should not wait until the appraisal meeting. The purpose of the appraisal meeting is to reflect briefly on experiences during the review period and to look ahead. Any specific complaints/ criticisms from employer/

employee should be dealt with separately during the year by using the agreed grievance/ complaints procedure within the organisation. These are not matters to be dealt with within the context of the staff appraisal.

**Agree measurable objectives and a plan of action**

The aim should be to end the appraisal meeting on a positive note. There should be an outcome from the appraisal meeting; either a continuation of previous behaviours and conduct, or a change to the employees' role that improves the situation for the employee and the organisation.

Appendix 2



# Cantley with Branton Parish Council

## Staff Self Appraisal Form

To be completed in preparation for your annual  
appraisal/review

**Name:** \_\_\_\_\_

**Job Title:** \_\_\_\_\_

**Appraisal Date:** \_\_\_\_\_

**What have you achieved in your key area of work during the appraisal period:**

**What do you consider to be your key strengths within your role:**

**What skill/knowledge areas would you like to develop to help byou in your role:**

**Which parts of your job do you enjoy the most:**

**Which parts of your job do you find the most challenging:**

**What are your goals for the next 12 months:**

**What can the Parish Council do to help you fulfil your role to the best of your ability:**

**Do you have any concerns or feedback for the Parish Council;**

**Signed** \_\_\_\_\_

**Name** \_\_\_\_\_

**Date** \_\_\_\_\_

**Acknowledged on behalf of the Parish Council**

**Name** \_\_\_\_\_

**Signed** \_\_\_\_\_ **Date** \_\_\_\_\_



### Appendix 3



## Cantley with Branton Parish Council

### Appraisal Form

<b>Employee's Name</b>	
<b>Job Title</b>	
<b>Appraiser</b>	
<b>Date of Meeting</b>	
<b>Objective/Competence</b>	
<p>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.</p>	
<b>Development and Training</b>	
<p>This section should be used to record any areas of the employees work where further training and support is required, and any areas where performance is particularly strong. Specific requirements for training and development should be outlines. These activities are not restricted to training courses and may include projects, coaching, planned experience or any other suitable activity that will enhance the skills, knowledge and behaviours required in the employees work or to develop further.</p>	

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**Other areas of Discussion**

This section should record any other points raised at the appraisal meeting

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<b>Employees Signature</b>	
<b>Appraisers Signature</b>	
<b>Date</b>	

One copy of this completed form will be kept by the employee and one by the appraiser to be kept on the employees personnel file