



Oliver's Battery Parish Council

Appraisal Policy Clerk

1. Introduction:

Oliver's Battery Parish Council (Council) currently has one employee which is the Clerk who also performs the role of Responsible Financial Officer (RFO). This appraisal policy relates to that role.

2. Purpose of appraisal:

To provide an opportunity for the Clerk and one or more members of the Council to discuss performance against set objectives and examine the personal development of the Clerk within the organisation.

Furthermore, by auditing the strengths and weaknesses in the role of the Clerk, suggestions for improvement can be made to the Council.

This appraisal policy is designed to be a developmental tool and should not be judgemental. Performance appraisal is intended to be part of any salary review process.

3. The appraisal cycle:

The appraisal cycle will be annual. In the case of a new Clerk being appointed, a six-month review will be held. Appraisal will normally be held at the start of the year.

4. Identifying the appraiser(s)

The appraisal process will be managed by the Council. The Chair of the Council will nominate a member, or members, of the Council to fulfil the role of appraiser.

5. Preparing for the appraisal meeting:

The appraiser(s) and Clerk will set a date for the formal appraisal meeting. To assist the process, the Clerk should complete the "Preparation for Appraisal: appraisee" form (page 3 of this policy). This form is intended to support the process and will not necessarily form part of the finished appraisal documentation. The appraiser(s) will prepare for the appraisal by completing the "Preparation for Appraisal: appraiser" form to which other Councillors can have an input before the appraisal meeting (page 4 of this policy). This form is also intended to support the process and will not necessarily form part of the finished appraisal documentation.

6. Conducting the appraisal meeting

The appraiser(s) should explain the purpose and scope of the interview, this being to:

- Review: previous objectives and discuss individual's performance, including achievements and concerns.
- Explore: what factors affected performance, examining both internal and external

constraints and issues.

- Agree: future performance objectives and identify any support.
- Plan: identify training and development needs and plan for implementation including costs and timescales.
- Review of job description.
- Summary and agreement.

Objectives should be SMART (specific, measurable, achievable, relevant and time-limited)
The results of the appraisal process will be recorded on the Performance Appraisal form, which is page 5 Policy document. A copy of the form will be kept securely by both appraiser and Clerk.

Review Date: Policy to be reviewed after a maximum period of four years from approval date

Preparation for Appraisal: appraisee

Name:

Clerk to Oliver's Battery Parish Council Appraisal Date:

1. What aspects of the role you feel you do well?
2. What aspects of the role you find difficult/problematic?
3. How might any such difficulties/problems be overcome?
4. What training (if any) do you feel you need?
5. What further support (if any) do you feel you need?
6. What areas do you think will be your main objectives in the next six months/year?

Preparation for Appraisal: appraiser(s)

Name(s):

Note: all councillors, not just those carrying out the appraisal, could contribute to these answers which are intended to inform the discussion at the appraisal meeting.

1. What are the Council's main requirements of the Clerk role? (needs to align with the Job Description)
2. What are the Clerk's strengths/accomplishments in relation to this role?
3. What problems/difficulties has the Clerk experienced? (cite examples and evaluate performance against objectives)
4. What are the main objectives of the Council for the next 6 months/year?
5. How do you think the Clerk can help the Council to achieve these objectives?

Performance appraisal form

Clerk:

Appraiser(s):

Appraisal review period:

Appraisal meeting date:

1. Identify the key areas of the role.
2. Review achievements and concerns during the appraisal review period.
3. In the light of this appraisal, identify any changes to the key areas of the role and make recommendations for any appropriate amendments.
4. Identify the main objectives for the next 12 months including development and training.
5. Summary.

Appraiser(s) signature(s):

Appraisee signature:

Assessment of Performance Against Expectations

| Key Areas of Role/Objectives | <i>Exceeded</i> | <i>Acceptable</i> | <i>Below</i> | <i>N/A</i> |
|--|-----------------|-------------------|--------------|------------|
| Statutory and other provisions | | | | |
| Risk assessment and management | | | | |
| Meeting agendas, minutes, action lists | | | | |
| Meeting administration | | | | |
| Correspondence | | | | |
| Study reports and other data | | | | |
| Draw up and present reports | | | | |
| Policies | | | | |
| Act as the PC representative | | | | |
| APM | | | | |
| Press releases | | | | |
| Update website | | | | |
| Update Facebook | | | | |
| Attend training | | | | |
| Achieve CiLCA | | | | |
| Bookkeeping | | | | |
| Monthly financial reconciliation | | | | |
| Quarterly financial reports | | | | |
| Staff remuneration | | | | |
| VAT | | | | |
| Annual accounts | | | | |
| Annual budget and precept | | | | |
| Invoices and payments | | | | |
| Overall | | | | |

Comments: