



BEMBRIDGE PARISH COUNCIL

The Clerk to the Council,
5 Foreland Road, Bembridge, Isle of Wight, PO35 5XN
Tel: 01983 874160 Email: clerk@bembridgepc.org.uk

Appraisal Policy and Form

Appraisals are used in organisations to help employees achieve and fulfil their potential and for the employer to continue to monitor performance in order to achieve its goals and improve the quality of the services which it provides. An appraisal interview is an opportunity to take an overall look at work content and volume, look back at what has been achieved, agree objectives for the future and consider what development needs the employee may have for the year ahead.

Purpose of appraisal:

To provide an opportunity for the employee to discuss performance against agreed objectives and support the employee's personal development in line with needs of the organisation.

The appraisal cycle:

The appraisal cycle will be annually, from the date of the last appraisal. In the case of a new employee being appointed, a three-month review will be held. Appraisal will normally be held between October and November, prior to budget setting.

The appraisal cycle will be managed by the Clerk. The appraisal will be conducted by two appraisers. The 2 appraisers will be selected from the Clerk, the Chair and Vice-Chair of the Parish Council, and the Chair of Finance and Governance Committee.

Preparation for the appraisal meeting:

The appraisers and employee will set a date for the formal appraisal meeting. To assist the process, the employee should consider questions listed at Annex A under "Preparation for Appraisal: appraisee". This is intended to support the process and will not form part of the finished appraisal documentation. The appraisers will similarly prepare for the appraisal by considering the questions under "Preparation for Appraisal: appraiser". This is also intended to support the process and will not form part of the finished appraisal documentation.

Appraisal meeting:

A constructive, open, two-way discussion on performance and development needs is the core of the appraisal. The following will be key features of the appraisal meeting:

- Review of previous year's objectives
- Discussion of achievements and concerns
- Agreeing objectives for the next year (no set number but all need to be SMART: Specific, Measurable, Achievable, Realistic and Timebound)
- Summary and agreement

The results of the appraisal process will be recorded on the Performance Appraisal form. This record should cover the key points of discussion between appraiser and appraisee, objectives for the next year, and identified training/development needs.

A copy of the form will be kept securely by both employee and Clerk/RFO and/or appraisers.

Confidentiality and GDPR:

Discussions, notes and records arising from the appraisal process shall be regarded as confidential. All Parish Council discussions shall take place in the absence of members of the public as provided for in the Standing Orders.

Annex A: Preparation for Appraisal

Employee

1. What aspects of the role you feel you do well?
2. Are there 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 to 12 months?

Appraiser

1. What are the Council's main requirements of the employee role? (Align with Job Description)
2. What are the employee's strengths/accomplishments in relation to this role?
3. Are there any problems/difficulties? (Cite examples and evaluate performance against objectives)
4. What are the main objectives of the Council for the next year?
5. How do you think the employee can help the Council to achieve these objectives?

APPRAISAL FORM

Personal details	
Name	
Department	Bembridge Parish Council
Job title	
Length of time in post	
Date of appraisal	

1. Objectives for review period	Outcomes

2. Other achievements

3. Were there any obstacles to the achievement of agreed objectives?

4. What steps can be taken to overcome these obstacles?

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5. Training and development

<u>Undertaken during review period</u>
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<u>Planned for the period to next review.</u>

6. Summary of objectives for next annual review period

Date of next review:

7. Overall performance rating

8. Comments by Appraisers:

Signed:

Date:

9. Comments by Employee

Signed:

Date: