

HALEWOOD TOWN COUNCIL

STAFF APPRAISAL POLICY

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1. POLICY AIMS

The aims of the Appraisal Policy are to:

- **encourage and improve communication between colleagues by providing a formal opportunity to discuss progress, priorities and training needs.**
- **achieve a clear understanding of what is expected and required, and to prepare an action plan, or work programme, where appropriate.**
- **identify training/development needs and aspirations.**

The appraisal process is not used for directly addressing performance, job evaluation or disciplinary related matters.

2. KEY PRINCIPLES

These are the five key principles, which underpin the appraisal process:

Universal:

Every employee will take part in the process.

Consistent:

Every employee will take part in the same process, and complete the same documentation, within the same timeframe.

Fair:

Every employee will have their performance reviewed against clear, relevant, achievable and agreed criteria. Performance will be judged against clear actions and outcomes – not compared with the performance of other employees, or other irrelevant factors.

Two-Way:

Each employee will have the same opportunity to have their own say in terms of their own performance and development: they will have the opportunity to

help set performance individual actions and expected outcomes, and to identify their own development needs, and how best to meet them.

Respectful:

All staff will be valued as individuals, whatever their contribution to performance. The scheme will value, and take positive account of, the diversity that exists among its employees, and the differing aspirations of the workforce. The scheme, its processes, documentation and timetable, are designed to encourage collaboration between participants.

3. HOW IS THE APPRAISAL CARRIED OUT?

An appraisal meeting will be held on a one-to-one basis with the employees' Line Manager/Supervisor; in respect of the Town Clerk, this will be the Chairperson of the Town Council.

4. NOTICE OF APPRAISAL

At least 14-days' notice, in advance of the appraisal meeting, will be given together with the appraisal form for completion and a copy of the employee's current job description.

5. RESPONSIBILITIES

The Employee

- Ensure you understand the process, and its purpose
- Agree with your Manager/Supervisor a date for the appraisal meeting and half-yearly review meeting, prepare and attend the meeting.
- Sign the appraisal document.
- Remind your Manager/Supervisor if you have not had your annual appraisal meeting or have missed any progress review meetings.
- Raise any concerns regarding your performance or development with your Manager/Supervisor as soon as they become an issue, rather than wait for a formal appraisal meeting.

The Line Manager:

- Ensure you understand the process, and its purpose.
- Explain the process to all staff.

- Arrange the annual appraisal meeting and all progress review meetings.
- Send copies of all required document to the appraisee.
- Complete all required documents.
- Ensure appropriate action is recorded and taken after each review meeting.
- Raise any concerns regarding individual performance with the employee with the employee as soon as they become an issue, rather than wait for a formal appraisal meeting.

6. PREPARATION BY THE EMPLOYEE

Prior to the appraisal meeting, Employees should reflect on their performance during the last appraisal period, giving consideration to:

- Knowledge of Duties
- Quality of Work
- Quantity of Work
- Relationships with Others
- Communication Skills
- Manual/Numeric/Operational Skills
- Supervision/Oversight of Staff
- IT Skills
- Managing Resources

Employees should make a note of any difficulties they have experienced or concerns, so that a constructive way to overcome them can be considered. Employees should also consider whether they have any constructive comments, questions, or suggestions they may wish to make.

Additionally, Employees should consider their own Interests and training aspirations, other specific factors affecting overall performance and their individual strengths and areas for improvement.

5. WHAT WILL HAPPEN AT THE APPRAISAL INTERVIEW?

A review of the past year's performance will take place, including an overall assessment of whether Key Objectives have been achieved from previous year's appraisal. A review of the employees current Job Description will also be undertaken, and agreement reached on any minor changes required.

Key Objectives will be set for the forthcoming year and a discussion take place if the way in which tasks are carried out can be improved.

Objectives need to be **SMART** – they need to be:

- Specific
- Measurable
- Achievable
- Relevant/Realistic
- Time related

It is important for the manager/supervisor and the employee to be specific and to recognise that listening is just as important as talking. The atmosphere must be one of openness and trust. Any comments made by the appraiser or jobholder are to be constructive and should not be seen as criticism.

6. WHAT RECORDS WILL BE KEPT?

At the end of the interview, the appraiser will sign and date Part C, the form should then be signed by the appraisee. (**Note:** Signing the form does not constitute formal agreement with the comments made by the Manager/Supervisor, merely that it is an accurate record of the meeting).

It is important that the Town Clerk/Chairperson of the Town Council is aware of all issues raised so that those of concern can be addressed.

The original will be kept in the employee's personal file and will be used for the purpose of reviewing the past year, prioritising tasks and objectives for the forthcoming year and identifying training/development needs and opportunities. Staff will be supplied with a copy of the completed appraisal.

7. APPEAL PROCEDURE

If an employee is not happy with the outcome of the appraisal, they should, in the first place, discuss the matter with the appraiser to reach agreement.

If, following discussions, an employee considers that their concerns have not been suitably resolved, then the matter should be discussed with the Town Clerk who will attempt to resolve the matter. In the case of those staff who report directly to the Town Clerk, the matter should be raised with the Chairperson of the Town Council.

If the problem remains unresolved, employees must appeal in writing to the Chairperson of the Town Council, within 10 working days of receipt of their copy of the appraisal form, requesting an appeal hearing by Elected Members of the Town Council.

They are, at the same time, also to inform the Town Clerk that they are appealing.

Linked Policies

- Staff Code of Conduct
- Disciplinary Policy

Last Review Date	November 2025
Next Review Date	May 2027
Date Approved	20 th November 2025