



Downham Market Town Council

Performance Appraisal Policy and Procedure

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A. Policy

1. Policy Statement

The purpose of this policy is to provide appraisal and review procedures for all town council employees. This policy is non-contractual and will be reviewed and amended from time to time.

2. Performance appraisal within Downham Market Town Council

Each year, each member of staff will take part in a meeting with the Town Clerk to discuss aspects of their work performance. The objective of the meeting will be to review the previous year's achievements and to discuss any future training, development and career planning relevant to the individual and to the Council.

This meeting should be regarded both as a stocktaking exercise and a springboard. Continuous dialogue throughout the year between the manager and the appraisee should inform the agenda of the meeting, and the outcome of the discussion should be a clear plan for both participants in terms of taking action to ensure that the appraisee is enabled to achieve their full potential in the work that they carry out for the organisation.

It is important that the appraisal scheme focuses upon some clear objectives so that the effort it demands from both appraisers (Manager) and appraisees (Employee) can be directed towards specific outcomes. The benefits of appraisal in terms of improved communication and enhanced performance, both for the individuals involved and for the Council, will be achieved only by the continuous commitment of all those involved in the scheme.

3. The objectives of the performance appraisal scheme

The objectives of the performance appraisal scheme are as follows:

- To provide a platform for managers and their direct reports to review aspects of job performance on a regular basis so that each individual is provided with the wherewithal to perform their job to the best of their ability, and to make the best contribution possible towards the Council's goals. The process should provide clear direction towards personal and organisational objectives, so that each individual is able to achieve their potential, gain maximum job satisfaction and contribute towards the organisation's success.
- To add value in identifying individual training, development and career needs. Discussions on such needs should focus upon genuinely assisting the appraisee in acquiring the relevant skills, knowledge and behaviours (competencies) for them to perform well in their current role. Opportunities for advancement or alternative work may also be on the agenda.
- To provide an opportunity for the Manager and Employee to review the Job Description, where small changes may need to be made, and to draw up draft amendments for review by the Human Resources Committee.
- To ensure that all appraisal processes are fair and equitable for all staff members.

4. Timing of appraisals

Each year in March, the Town Clerk will prepare a schedule so that each member of their team is allotted an appraisal meeting with them. The Town Clerk's appraisal will take place first in any given review cycle.

New employees who are still in their six-month probationary period will be seen as normal for their probation one-to-ones. Otherwise, all employees who have successfully completed their probationary period will be included on the appraisal schedule.

The appraisal interviews will take place during April. The appraisal interview schedule will start with senior staff members working downwards in order that communication of council's objectives can be made more effectively. It is important that these objectives are considered when discussing performance and development with you so that you remain clear about the importance of your work within the context of the Council's objectives and that any planned development is relevant to the Council's needs.

B. Implementation

5. Roles and responsibilities

Appraisal reviews will be undertaken as follows:

Town Clerk	By the Chair of HR Committee and one other representative of the HR Committee
Deputy Town Clerk	By the Town Clerk
Administrative Staff	By the Town Clerk
Maintenance Staff	By the Town Clerk

The Town Clerk is expected to:

- arrange annual, interim and informal review meetings.
- issue in good time any forms for completion.
- maintain records of discussions, objectives and actions.

The employee (including the Town Clerk) is expected to:

- complete relevant parts of review forms prior to any meeting and submit them on time to the Town Clerk or the Chair of the Human Resources Committee.
- prepare for and participate fully in the review meeting.
- take responsibility for following agreed objectives.
- be ready to report progress at subsequent meetings (annual and interim), to include giving updates on any difficulties or obstacles that have arisen and explore with the line manager, means of overcoming these.
- sign and return review forms to the line manager.

The Human Resources is expected to ensure that:

- identified training needs are met;
- for all staff, the Performance Management process is followed fairly, and reasonable timings adhered to.

6. Appraisal forms

The appraisal forms are designed to prompt you and your manager to focus on the correct agenda in line with the objectives of the appraisal scheme. They must be completed as a faithful record of the discussion that took place at the appraisal meeting, and the action summaries should be used as a planner so that any agreed outcomes are followed up conscientiously.

The appraisal preparation form is designed to prompt you to give some thought to the areas that the appraisal meeting will address. You should return a completed preparation form to your manager at least one week before the appraisal meeting so that they can do any necessary preparation.

7. Appraisal training

Prior to carrying out the appraisal interviews, the Town Clerk will meet with the team to carry out an information/training session, where required, so that you are familiar with the process and understand how you can participate fully in it.

8. Review of appraisals

The Human Resources Committee will meet once the appraisals are completed, to review the appraisals that have been carried out. This exercise is not designed for Councillors to offer their views on any individual; its purpose is to review the fairness and effectiveness of each appraiser's approach to the process.

9. Completed forms

Any paperwork or electronic filed forms should be completed within two weeks of the appraisal meeting and must be kept confidential. Either a hard copy or an electronic copy must be lodged on the individual's own personnel file, but they must have a copy of the appraisal for their own records and safekeeping. The completed appraisal form and action plan must be viewed as working documents and as such be continually referred to and reviewed throughout the year.

The development and training section of the appraisal form should be set up as a separate file so that the information on it can be used in setting up the training plan for the forthcoming year.

When conducting your appraisal, Downham Market Town Council processes personal data collected in accordance with its Data Protection Policy. Data collected by the Council as part of the operation of the appraisal process is held securely and accessed by, and disclosed to, individuals only for the purposes of managing your appraisal. Inappropriate access or disclosure of employee data constitutes a data breach and should be reported in accordance with the Council's Data Protection Policy immediately. It may also constitute a disciplinary offence, which will be dealt with under the Council's Disciplinary Procedure.

10. Request for review

Any appraisee who feels that their appraisal was unsatisfactory or unfair to them may ask that another person review the appraisal with themselves and the appraiser. This would ordinarily be the Mayor and Deputy Mayor of Downham Market Town Council.

This is a non-contractual procedure which will be reviewed from time to time.