



Appraisal Policy

Horsforth Town Council is committed to supporting every employee to reach their potential and achieve their personal goals, which in turn will assist the council to achieve its objectives.

The purpose of appraisals is to monitor and evaluate staff performance and development at an individual level as part of the Council's normal managerial function. The review enables the Council to:

- Consistently measure individual performance
- Focus staff performance on organisational objectives
- Encourage continuous improvement

The Council's policy is that each member of staff will attend an annual review meeting to evaluate his/her performance and development. At the end of the review meeting, staff should have an agreed individual action plan (with targets and timescales), and where appropriate an individual training plan (with objectives and resources). The plans will be referred to as working documents throughout the year and will be updated accordingly.

Core principles of the Appraisal Policy

1. The appraisal process aims to improve the effectiveness of this Council by contributing to achieving a well-motivated and competent workforce.
2. To ensure all job descriptions are current and accurate and that they align to the Council's objectives.
3. To ensure that staff have the opportunity to know what performance is expected of them at an individual level and to receive feedback.
4. To ensure that staff are able to discuss training, development and support within their role, in order to fulfil their maximum potential.
5. To assist staff in understanding the contribution their role makes in meeting the Council's overall objectives.
6. The appraisal discussion is a two-way communication exercise to ensure that both the needs of the individual, and of the organisation are being met, and will be met in the next year.
7. The appraisal discussion will review the previous year's achievement and will set agreed objectives for the coming year for each member of staff.
8. The appraisal process will provide the Council with valuable data to assist succession planning.

Appraisal Implementation

Appraisal discussions will be held over a designated period on an annual basis as per the Contract of Employment (prior to approval of Council's budget for the next fiscal year). They will be arranged by the Staffing and Employment Committee.

The discussion will be held in private. Information shared during the appraisal will be shared only with the Staffing and Employment Committee of the Council; confidentiality of appraisal will be respected.

All appraisal documents should be issued to both parties prior to the discussion, in order to allow time for both parties to reflect and prepare. These will provide a framework and focus for the discussion.

The appraisal process will be a fair process in line with the council's Equality Policy.

A time and venue for the discussion will be advised at least one week before the meeting takes place.

The Appraisal Discussion

The appraisal discussion will allow an opportunity for both the employee and the appraiser to reflect and comment on the previous year's achievements. It will praise achievement and encourage the appraisee in his/her role.

The appraiser is accountable for giving the employee constructive, timely and honest appraisals of their performance, which should take into account both the goals of the organisation and of the individual.

The discussion should be a positive dialogue and will focus on assisting the employee to acquire the relevant knowledge, skills and competencies to perform his/her current role to the best of his/her abilities.

The duties within your job description will be thoroughly assessed, and potential areas for development may be identified and addressed through training and/or supervision. Your training needs will be identified and agreed.

The appropriate forms will be completed and signed by both parties.

The appraisee will be given the opportunity to note any comments that he/she does not agree with and complete a self-assessment. The appraisee and line manager should agree on objectives for the appraisee for the following year. This will reflect the employee's aspirations and the Council's requirements and should align personal and Council goals. The Council and the line manager will support the individual to achieve these goals during the forthcoming year.

Any training needs, future training requirements, planned qualifications, development opportunities and career planning should be discussed in the appraisal.

Adopted: 18th May 2023

Review date: May 2024

**Horsforth Town Council
Staff Appraisal Form**

Name:	
Post:	
Date appointed to current post:	

Period covered by this appraisal:			
From:		To:	

**Part A: Employee to complete this part.
(Use your job description and previously agreed objectives to complete this section of the form. Please review your job description and any Council aims and objectives to ensure continued relevance)**

1 Performance Over the Review Period

1.1 How would you describe your overall performance during the review period?

1.2 Which parts of your job have you performed most effectively?

1.3 Which parts of your job have not gone so well?

1.4 State any part of your job description that you are not doing.

1.5 State any areas of work that are not in your job description.

2	Yours Skills and Expertise
2.1	What are your key strengths in your job?
2.2	Do you possess skills and strengths not fully used in your job?
3	Development Needs
3.1	What parts of your job do you find most difficult and why do you find them difficult?
3.2	Has a lack of a particular experience or skill affected your performance?
3.3	What additional training have you undertaken during the review period?
3.4	What additional training or experience would now be of benefit to help you achieve future targets/objectives?

4 Objective/Target Setting (Use your job description and any Council's aims and objectives to consider what you intend to achieve next year)
4.1 What potential individual objectives/targets do you want to discuss with your appraiser?
4.2 What development objectives/targets have high priority?
4.3 Describe any particular help and/or support you feel you need to achieve your objectives/targets.

Part B: Appraiser to complete this part.

Consider what the employee has written in Part A and make comments in this part (Part B). When you have completed the appraisal interview and agreed objectives, training and development plans, the overall summary and plans for the following year should be summarised in Part C. You should obtain the employee's comments and signature in Part 4 and give the employee a copy of the full document for their records.

Appraiser name:			
Date of appraisal:			
Period covered by this appraisal:			
From:		To:	

1	Comments
1.1	Comment on identified main achievements (add anything else that was done particularly well)
1.2	Comment on work or anything else which has not gone well
1.3	Comment on any tasks that should no longer be in the job description and any that should be included
1.4	Give your overall assessment of the employee's performance during the review period (include strengths, weaknesses and any constraints to their work and the outcome of specific agreed objectives)

Part C: Future Plans

1 Agreed Objectives

(although there are no set number of objectives those set should cover key aspects of the employee's job and have direct relevance to any Council aims and objectives)

2 Training/Development Actions

Part D: Employee Comments**(This part provides space for the employee to comment on the completed form and the appraisal process)**

Signature of Appraisee	
Signature of Appraiser(s)	
Date	