

WESTON-IN-GORDANO PARISH COUNCIL

Appraisal Policy

1. Purpose

This policy sets out Weston-in-Gordano Parish Council's approach to the appraisal of its Clerk. It provides a structured, fair, and transparent framework to support performance, professional development, and alignment with Council priorities.

2. Scope

This policy applies to the Clerk to the Council. The Council currently employs one member of staff.

3. Principles

The appraisal process will be:

- fair and objective
- consistent and transparent
- confidential
- forward-looking and developmental
- supportive of professional growth

4. Appraisal Responsibility

The Clerk will be appraised by the Employment Committee, once established, acting on behalf of Weston-in-Gordano Parish Council. Until such time as an Employment Committee is formally appointed, appraisal arrangements will be determined by resolution of Full Council and undertaken by a small Appraisal Panel of councillors appointed for that purpose.

Councillors involved in the appraisal process must not participate in any appeal relating to that appraisal. Where appropriate, structured feedback may be sought from councillors, contractors, or other relevant stakeholders. Any feedback will be proportionate, professional, and focused on role-related performance.

5. Appraisal Objectives

The appraisal process aims to:

- review performance and workload
- recognise achievements and strengths
- identify areas for improvement
- agree objectives and priorities
- identify training and development needs

6. Appraisal Process

6.1 Frequency

Appraisals will normally take place every six months, usually in March and September, unless otherwise agreed by Council.

6.2 Preparation

Both the appraisers and the Clerk will prepare in advance. The following documents should be available:

- job description
- previous appraisal records (if any)
- previously agreed objectives

6.3 The Appraisal Meeting

The appraisal meeting will:

- take place in a private, interruption-free setting
- be informal but structured
- encourage open, two-way discussion
- focus on performance, development, and future objectives

6.4 Assessment

Performance will be assessed as Satisfactory, or Requiring Improvement, supported by written narrative.

6.5 Documentation

A written appraisal record will be completed and shared with the Clerk as soon as practicable following the appraisal. The Clerk will have the opportunity to add comments before signing the document.

6.6 Records

Signed appraisal documents will be retained securely within confidential personnel records.

6.7 Follow-Up

The appraisers are responsible for ensuring that agreed actions and development activities are progressed.

7. Interim Reviews

Interim reviews may be held following completion of a significant project or where Council priorities change materially. Formal appraisal paperwork is not required, but any agreed actions should be recorded.

8. Training and Development

Training and development needs will be identified jointly and linked to the Clerk's role and Council objectives.

The GROW model may be used to structure discussions:

- Goals – What is to be achieved?
- Reality – What is the current situation?
- Options – What options are available?
- Way Forward – What actions will be taken?

9. Unsatisfactory Performance

Where performance concerns are identified, an action plan will be agreed. If performance does not improve despite reasonable support and training, the Council's disciplinary procedure may be invoked. A disciplinary process is not an automatic outcome of a poor appraisal.

10. Confidentiality

Appraisal records are confidential and will only be accessible to the Clerk and those formally involved in the appraisal or appeal process. Council will be informed that an appraisal has taken place, but not of its content.

11. Objective Setting

Objectives should:

- reflect the Clerk's role and Council priorities
- be limited in number (normally 6–8)
- include at least one professional development objective

Objectives should be SMART: Specific, Measurable, Agreed, Realistic, Timed.

12. Appendix and use of Appraisal Form

The appraisal forms included in the appendices form part of this policy and are to be used as follows:

Sections 1 and 2 of the appraisal form are completed after the Clerk's first six months in post, and are used to support the end of probation review and confirmation of appointment.

Sections 3 and 4 are used for all subsequent appraisals and review meetings following completion of the probation period.

This approach ensures that the initial appraisal appropriately focuses on induction, suitability for the role, and confirmation of appointment, while later appraisals focus on ongoing performance, objectives, and professional development.

Version number	Purpose/change	Author	Date
0.1	Initial draft	LS	Dec 2025
0.2	Approved	LS	Jan 2026
0.3			

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FIRST APPRAISAL FORM

SECTION 1

NAME: _____

JOB TITLE: _____

DATE, TIME AND PLACE OF INTERVIEW: _____

NAME OF APPRAISER: _____

Section 2 was completed at the interview by xxxxxx and then checked and signed by xxxx.

SECTION 2

1. How do you feel you have contributed to the smooth running of the council?
2. What do you feel have been your main achievements?
3. What do you feel have been your main areas of difficulty?
4. How could these be overcome?
5. What particular strengths do you feel you have and to what extent are they being used?
6. What weaknesses, if any, do you have in fulfilling the responsibilities of your job?
7. How would you assess your own ability to be organised and get things done?
8. How would you describe your relationship with the councillors?
9. What do you like most and least about your job?
10. How challenging do you find your current position?
11. Do you have any capabilities or interests which you feel might be better used than at present?
12. In what areas do you think you could improve your performance?
13. What changes do you think could be made to alleviate any difficulties, weaknesses and pressure and enable you to use your strengths to make your job more enjoyable/challenging?
14. Do you feel that we provide enough assistance to help you develop?
15. What do you see yourself doing within
 - a) the next 2 years?
 - b) the next 5 years?
16. What do you feel could prevent you from achieving the above?
17. Chose four / five objectives from your job description which you would like to work on in the next year?
18. What training is needed to help you work on these?
19. Are there any additional points in respect to your job which you would like to discuss?

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SECTION 3: ACTION PLAN FOR

NAME: _____

JOB TITLE: _____

DATE OF INTERVIEW: _____

NAME OF APPRAISER: _____

1. KEY WORK TARGETS FOR NEXT SIX MONTHS

2. NEW RESPONSIBILITIES (if any)

3. ADDITIONAL ACTION POINTS (if any)

4. TRAINING AND DEVELOPMENT NEEDS
NEEDS

OBJECTIVE(S)

5. ADDITIONAL COMMENTS

REVIEW DATE: _____

CLERK'S SIGNATURE DATE

EMPLOYEE'S SIGNATURE DATE

Issue a copy of whole appraisal to the employee and employment file. Issue a copy of Section 3 to the Employment Committee. Set the next review date, depending on the information above.

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APPRAISAL REVIEW FORM

NAME: _____

JOB TITLE: _____

DATE OF INTERVIEW: _____

NAME AND TITLE OF LINE MANAGER: _____

1. REVIEW OF KEY WORK TARGETS

ADDITIONAL / NEXT TARGETS SET

2. REVIEW OF NEW RESPONSIBILITIES/ADDITIONAL ACTION POINTS (if any)

3. REVIEW OF TRAINING AND DEVELOPMENT NEEDS

<u>ADDITIONAL TRAINING AND DEVELOPMENT NEEDS SET</u>	
<u>NEEDS</u>	<u>OBJECTIVE(S)</u>

4. COMMENTS (EMPLOYMENT COMMITTEE AND OR EMPLOYEE)

NEXT REVIEW DATE:

CHAIRMAN'S SIGNATURE DATE

EMPLOYEE'S SIGNATURE DATE

Issue a copy of section 4 to the employee, Chairman of the Employment Committee and employment file;
set the next review date, depending on the information above.