



SHAVINGTON  
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Shavington-cum-Gresty Parish Council  
Main Rd, Shavington, Crewe, CW2 5DP

## APPRAISAL POLICY

Adopted by Shavington cum Gresty Parish Council on 2 March 2022  
Reviewed by Shavington cum Gresty Parish Council on 6 September 2023

### **Purpose of appraisal:**

To provide an opportunity for the employees and one or more members of the Parish Council to discuss performance against agreed objectives and support the personal development of the Parish Council employees consistently with the needs of the organisation.

### **The appraisal cycle:**

The appraisal cycle will be annually. In the case of a new officer being appointed, a six-month review will be held. Appraisal will usually be held in September/October, so that decisions taken can be reflected in the budget setting for the forthcoming financial year.

### **Identifying the appraiser(s):**

The appraisal cycle will be managed by the Staffing Committee. The appraisal will be conducted by the Clerk or by three councillors in case of the Parish Clerk: Chair and Vice-Chair of the Parish Council and Chair of the Staffing Committee.

### **Preparation for the appraisal meeting:**

The appraisers will invite all councillors to provide feedback on performance and development needs prior to the appraisal meeting.

The appraisers and appraisee will set a date for the formal appraisal meeting.

To assist the process, the appraisee should consider questions listed at Annex 1 under "Preparation for Appraisal: appraisee". This is intended to support the process and will not form part of the finished appraisal documentation. The appraiser will similarly prepare for the appraisal by considering the questions under "Preparation for Appraisal: appraiser" to which the Clerk or other Councillors can have an input before the appraisal meeting (gathering evidence, above). This is also intended to support the process and will not form part of the finished appraisal documentation.

### **Appraisal meeting:**

It is the policy of Shavington-cum-Gresty Parish Council to maintain a meaningful and effective appraisal system that will monitor performance against agreed and achievable targets and responsibilities and provide an opportunity for each member of staff to have their performance reviewed.

The aim is to provide an effective and efficient service and a satisfactory working environment to all employees.

Employees must be regularly advised as to how they are doing and at regular intervals must have the opportunity to discuss their performance with their line manager. Opportunities for continuing personal and



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professional development shall be ensured and advice and mentoring shall be available and accessible to all.

The following will be key features of the appraisal meeting:

- Discussion of achievements and concerns
- Performance review
- Agreeing objectives for the next year
- Summary and agreement

Performance reviews will refer to core responsibilities of the role listed in the job description, as well as to the agreed objectives for the previous year. Appraisee and appraisers will contribute toward the ratings, and both parties will endeavour to agree on a final score for each element of discussion. If no agreement can be reached, then the appraiser score will go forward.

Performance reviews will assess two elements:

- a. General evaluation against job description– which will count 60% of the final score;
- b. Agreed objectives from the previous year – which will count 40% of the final score.

Performance review rating of 2.5 to 3.9 are the average, 1 to 2.5 are considered poor, while 4 to 5 suggest over-delivery compared with job expectations and might trigger a job description and pay scale review.

The results of the appraisal process will be recorded on the Appraisal form, which is at Annex 2. 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 appraiser and appraisee.

### **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.



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## ANNEX 1

### Preparation for appraisal form (Appraisee)

Name:	Job title:
<p>Please agree with your manager how you will use this preparation form and whether you will be forwarding it to him/her before the date of your appraisal meeting.</p> <p>Your meeting is appointed for [time] on [date] and will take place in [meeting room].</p>	
<p>1. Are you clear about what is required of you in your job and how this contributes to the organisation's goals? Please use your job description and previously agreed objectives to help you consider this question.</p>	
<p>2. Please list any particular areas of your job in which you feel that you have particular strengths?</p>	
<p>3. Please list any areas of your job in which you feel that you would like additional support to be able to do the work more effectively?</p>	



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4. What training and development would you like to access to help you to do your job well or to develop into another role within the organisation?

5. Please list any other areas of work within the organisation that interest you?

6. Are there any other points that you would like to raise? Please list them.



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## Preparation for appraisal form (Appraisers)

Name:	Job title:
<p>Note: all councillors, not just those carrying out the appraisal, could contribute to these answers which are intended to inform the discussion at the appraisal meeting.</p>	
<p>1. What are the Council's main requirements of the xxx role? (needs to align with the Job Description)</p>	
<p>2. What are the employee's strengths/accomplishments in relation to this role?</p>	
<p>3. Are there any problems/difficulties? (be prepared to cite examples and evaluate performance against objectives)</p>	



**ANNEX 2**

**Appraisal Form**

<b>Employee's name:</b>	
<b>Job title:</b>	
<b>Date of engagement:</b>	
<b>Manager:</b>	
<b>Date of meeting:</b>	
<b>Current performance</b>	
This section should be used to record discussion on the key areas of the job, and include a summary of achievement in any objectives that have been previously agreed.	
<b>Development summary</b>	
This section should be used to record any areas of the employee's work where further training and support is required, and any areas where performance is particularly strong and should be developed further.	
<b>Development and training</b>	
This section should list specific requirements for any training or development. These activities are not restricted to training courses, and may include attachments, projects, coaching, planned experience or any other suitable activity that will enhance the skills, knowledge and behaviour required in the employee's work.	



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**Career planning**

This section should record any areas of the department or organisation in which the employee has expressed a specific interest.

**Other areas of discussion**

This section should record any other points raised at the appraisal meeting.

**Employee's signature:**

**Appraiser's signature:**

**Date:**

**Reviewing manager's signature:**

**Date:**

**One copy of this completed form will be kept by the appraiser, one by the appraisee and one in the employee's personnel file.**



## Performance Review

Please provide objective ratings using a five-scale system.

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### RATING SCALE

5 (Outstanding) Performs significantly above the quality/quantity criteria for this role

4 (Exceeds Expectations) Generally exceeds the quality/quantity criteria for this role

3 (Meets Expectations) Meets the set criteria for the designated role.

2 (Needs Improvement) Didn't fully meet the set criteria for the designated role.

1 (Unacceptable) Performs significantly below set criteria

\*\*\*

### General Evaluation

<b>1</b>	<b>Organizational Knowledge &amp; Judgment</b>		
	<i>Demonstrates knowledge of the standard operating procedures, processes and equipment necessary for this role. Recognizes and resolves potential issues using sound judgment to determine the right course of action. Involves others in the decision-making process as needed.</i>		
<b>Ratings</b>	Self	Panel	Agreed
<b>2</b>	<b>Skillset</b>		
	<i>Possess all the knowledge and expertise to effectively perform the assigned duties. Demonstrates interest in completing assigned training to obtain new skills and/or proactively masters new competencies independently.</i>		
<b>Ratings</b>	Self	Panel	Agreed
<b>3</b>	<b>Quality of Work</b>		
	<i>Demonstrates high quality of work in general; ensures thoroughness, accuracy, completeness of work.</i>		
<b>Ratings</b>	Self	Panel	Agreed
<b>5</b>	<b>Productivity &amp; Dependability</b>		





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	<i>Demonstrates effective time management; ensures assigned tasks are completed efficiently. Adheres to the set organizational schedule; displays commitment to delivering the assigned work on time and at expected levels of quality/output.</i>		
<b>Ratings</b>	Self	Panel	Agreed
<b>6</b>	<b>Communication</b> <i>Has effective and appropriate verbal and written communication and listening skills. Remains accessible and available to other member of staff/councillors/member of public as needed.</i>		
<b>Ratings</b>	Self	Panel	Agreed
<b>7</b>	<b>Initiative</b> <i>Demonstrates resourcefulness, versatility; and teamwork qualities necessary to conceptualize and carry out additional duties.</i>		
<b>Ratings</b>	Self	Panel	Agreed
<b>Agreed objectives</b>			
<b>1</b>	<b>Objective 1</b> <i>Please provide objective ratings of the employee's agreed objectives using a five-scale system.</i>		
<b>Ratings</b>	Self	Panel	Agreed
<b>2</b>	<b>Objective 2</b> <i>Please provide objective ratings of the employee's agreed objectives using a five-scale system.</i>		
<b>Ratings</b>	Self	Panel	Agreed
<b>...</b>	<b>...</b>		
	<b>OVERALL RATING</b>		



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## Form for action plan following appraisal

<b>Employee's name:</b>	
<b>Job title:</b>	
<b>Department:</b>	
<b>Date of engagement:</b>	
<b>Date of appointment to current role:</b>	
<b>Manager:</b>	
<b>Date of performance appraisal meeting:</b>	

The following objectives have been agreed for the coming year to address developmental and departmental needs.

Objective agreed	Action required to implement	Target date
1.		
2.		
3.		
4.		
5.		

<b>Employee's signature:</b>	
<b>Appraiser's signature:</b>	
<b>Date:</b>	



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<b>Reviewing manager's signature:</b>	
<b>Date:</b>	
<b>One copy of this completed form will be kept by the appraiser, one by the appraisee and one in the employee's personnel file.</b>	



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