



SHAVINGTON
CUM
GRESTY

Appraisal Policy and Forms

Adopted by Council on	4 February 2026
Reviewed on	
Next review due	

1. Purpose

This policy sets out how the Council will run a simple, fair and development-focused Performance and Development Review (PDR) process (sometimes called an appraisal). The PDR is a structured conversation between an employee and their line manager to review the year, recognise achievements, identify any support needed, and agree objectives and development for the year ahead.

2. Scope

This policy applies to all employees of Shavington-cum-Gresty Parish Council, regardless of hours worked or length of service. It covers annual PDR meetings and in-year check-ins. It does not replace day-to-day management or any formal procedures for conduct, grievance or capability.

3. Core principles

- One-to-one and proportionate: the formal PDR meeting is normally conducted by a single appraiser (the line manager, or in the case of the Clerk, Staffing Committee).
- Two-way discussion: the employee and manager both prepare and both contribute.
- Focused on improvement and development: clear objectives, feedback and a practical development plan.
- Linked to the Council's priorities: objectives should support delivery of the Council's plans and legal duties.
- Fair and consistent: the Council will aim to apply the process consistently and without unlawful discrimination.
- Confidential and respectful: information is handled in line with data protection requirements and discussed respectfully.



SHAVINGTON
CUM
GRESTY

4. Roles and responsibilities

4.1 The employee (appraisee)

- Completes the self-assessment/preparation section of the form (Annex 1) and brings examples/evidence as appropriate.
- Participates openly in the discussion and helps agree realistic objectives and development actions.
- Flags any wellbeing, workload, resourcing, or support needs.

4.2 The appraiser (line manager)

- Schedules the PDR and ensures the employee has enough notice and time to prepare.
- Gathers relevant evidence and feedback (see section 6.2) and brings examples to support feedback.
- Leads the meeting, gives constructive feedback, and agrees objectives and a development plan with the employee.
- Completes the record promptly and shares a copy with the employee.

4.3 Who is the appraiser?

The appraiser is normally the employee's line manager:

Employee group	Normal appraiser
All employees other than the Clerk	The Clerk (or other designated line manager)
The Clerk	Staffing Committee

A note-taker/observer may attend only by mutual agreement and where this is helpful (for example for training a new appraiser).

5. The PDR cycle and check-ins

The Council uses a 'continuous conversation' approach: a formal annual PDR supported by informal one-to-one conversations as needed.

- Annual PDR: normally held in March/April to inform training and align with the annual business plan.
- Mid-year check-in: normally held around 6 months after the annual PDR (if needed) to review progress and adjust objectives.
- New starters: probationary period objectives should be agreed within the first month in post, with a review at the end of any probation period (for example at 6 months).

6. Preparation

6.1 Employee preparation

The employee should complete the preparation/self-assessment prompts in Annex 1 and consider:

- Key achievements and what helped them succeed.
- Any challenges and what would help remove barriers.
- Progress against last year's objectives (with examples/evidence where possible).



SHAVINGTON
CUM
GRESTY

- Training/learning undertaken and any development goals for the year ahead.

6.2 Evidence and feedback

The appraiser should prepare by reviewing relevant information such as the job description, prior objectives and key work outputs. Where the employee's role involves supporting councillors or external stakeholders (for example the Clerk), the appraiser may also seek structured written feedback using Annex 2.

Feedback should be factual, work-related, and supported by examples. The appraiser should summarise feedback themes for discussion; the PDR meeting itself is conducted between the appraiser and employee.

7. The PDR meeting

The standard agenda is:

1. Welcome and purpose of the meeting (including confidentiality and how notes will be handled).
2. Review of the period: achievements, what went well, and what was difficult.
3. Review of last year's objectives (what was delivered) and key behaviours/ways of working (how it was delivered).
4. Wellbeing, workload and resourcing discussion (what support is needed).
5. Learning and development review and plan for the year ahead.
6. Agree objectives for the next period (normally 3 to 5), including success measures and timescales.
7. Summary, confirm next check-in date, and agree the written record.

8. Ratings (optional)

The Council's default approach is to use clear narrative feedback supported by evidence. Where a rating is useful (for example to summarise progress against objectives), the form provides a simple four-point scale:

- Exceeds expectations
- Meets expectations
- Partly meets expectations (support/adjustments required)
- Does not meet expectations (performance improvement action required)

Ratings are not used in isolation. Any 'partly meets' or 'does not meet' outcome must be explained with examples and accompanied by a clear improvement plan and support.

9. Performance concerns

The PDR is not a disciplinary or grievance process. Any conduct or grievance matter should be managed under the appropriate Council procedure. If performance concerns are identified, they should be addressed promptly through one-to-one supervision and, where necessary, a separate capability/performance improvement process.



SHAVINGTON
CUM
GRESTY

10. Recording, storage and confidentiality

The PDR record (Annex 1) is confidential. A signed copy will be provided to the employee and a copy stored securely in the employee's personnel file. Access is limited to those who need it for legitimate management and governance purposes.

Only the headline outputs required for workforce planning (for example agreed training budget or confirmation that a PDR took place) should be shared more widely within the Council, unless the employee consents.

11. Equality and reasonable adjustments

The Council will run the PDR process fairly and will make reasonable adjustments where required (for example around meeting format, timescales or accessibility). Objectives and expectations should be appropriate to the role, hours, and any agreed adjustments.

12. Disagreement with the record

If the employee disagrees with any part of the written record, they should first discuss this with the appraiser. The employee may add written comments on the form. If there is still disagreement, the employee may request that the Staffing Committee Chair (or another nominated councillor) reviews the record and facilitates a resolution meeting.

13. Review of this policy

This policy will be reviewed at least every two years, or sooner if there are significant changes to employment good practice or Council arrangements.



Annex 1: Performance and Development Review (PDR) Form

This form is the formal record of the annual PDR. It can also be used for a probation review or mid-year check-in.

A. Employee and meeting details

Employee name	Job title	Appraiser	Date of meeting
Review period (from/to)			
Type of review			
Location / meeting method			

Type of review (tick): Annual PDR Mid-year check-in Probation review Other: _____

B. Summary of the period

Key achievements (include examples/evidence):	
Key challenges / barriers (and what would help):	
Wellbeing, workload and resourcing (tools, support, adjustments, working pattern):	

C. Review of objectives for the period

Rating scale (optional): Exceeds / Meets / Partly meets / Does not meet.

Objective	Success measures / evidence	Outcome (what happened?)	Rating (optional)	Notes / support needed

D. Behaviours / ways of working

Discuss how the role has been carried out, aligned to the Council's expectations and values.

Behaviour area	Examples of strengths / effective practice	Examples to improve / support needed	Rating (optional)



SHAVINGTON
CUM
GRESTY

Public service, integrity and confidentiality			
Managing a quality service (accuracy, compliance, customer focus)			
Communicating and influencing (clear, timely, respectful)			
Working together (relationships, collaboration, stakeholders)			
Planning and delivering (prioritising, deadlines, dependability)			
Developing self and others (learning, improvement, knowledge sharing)			

E. Development plan

Record agreed learning and development actions (courses, coaching, shadowing, projects, reading, mentoring, etc.).

Development need / goal	Action (what will be done?)	Support/resources required	Target date	Completed (date)

F. Objectives for the next period

Agree 3 to 5 objectives for the next period. Objectives should be outcome-focused and SMART.

Objective	Success measures	Target date	Support / dependencies	Progress check-in date(s)



G. Sign-off

SHAVINGTON
CUM
GRESTY

Employee signature	Date	Appraiser signature	Date
Employee comments (optional, especially if any disagreement):			
Next check-in scheduled for:		Copy provided to employee on:	



SHAVINGTON
CUM
GRESTY

Annex 2: Optional councillor/stakeholder feedback (for the appraiser)

This short form can be used by the appraiser to gather input before the PDR where this would be helpful (for example for the Clerk role). It is optional and should be used proportionately. Feedback should be factual, work-related and supported by examples.

Employee name	
Your name / role	
1. What has the employee done particularly well this year? (examples)	
2. Any specific issues/concerns? (examples, impact)	
3. What should be the employee's top priorities/development focus for the next period?	