

**BARTON UNDER NEEDWOOD  
PARISH COUNCIL**

**Appraisal Policy and Protocol**

Prepared by: Cllr Sally Bedford  
Reviewed By: Policy Working Group  
Approved for recommendation to full Council by: Human Resources Committee  
  
Reviewed and adopted by: Full Council  
  
Meeting dated ...9 January 2025..... Minute number ...25/07/5.....

Signed by Chairman of the Council ...[signature redacted]

Next Review Due by January 2026

# 1. Introduction

The Council's Appraisal Scheme is designed to promote development by reviewing past performance and looking ahead to set achievable objectives.

The aims of the review are:

- To enhance the quality of service delivery by Barton under Needwood Parish Council through encouraging the Parish Clerk and other staff to achieve high standards of performance.
- To help the Parish Clerk and other staff develop to their fullest attainable level of potential and achieve job satisfaction.

## 2. To the Appraisee (the Parish Clerk)

Please complete Section 1 in as frank and honest a way as possible giving as much detail as you can. This will enable the Council to better identify and address any problems and issues that have arisen. If possible please type the completed section and send an electronic copy to the Council Chair and HR Committee Chair (HRC Chair).

When completing this bear in mind that your role as Parish Clerk and Responsible Finance Officer is complex and multiplex. Refer to your current job description, giving due emphasis to the spread of roles that you have to perform and the weighting of each. In particular consider your delivery in terms of the targets for your specific responsibilities and related tasks as currently agreed.

You will also need to review the objectives set at the last review, whether they have been achieved or not and importantly any factors that assisted in completing them, or problems and issues that have arisen in respect of fulfilling them. This will help the Council develop/maintain best practice in supporting you and delivering its services.

You should have a copy of the agreed programme leading up to and following the appraisal interview date recorded above. Please ensure that Section 1 of the form is returned two weeks before this date in order that the Chair and HRC Chair have adequate time to review this and consider the completion of Section 2.

At the appraisal interview you will jointly agree with the Chair and HRC Chair proposed new work objectives, along with a training and development plan to help you achieve these and continue to maintain or develop necessary skills. Together you will review your job description, responsibilities, tasks and targets, with any proposed changes also recorded. These and any additional points arising from the discussion during the appraisal interview will be recorded in Section 2. You will have a final opportunity to comment on the appraisal, objectives and training plan in Section 3 before a summary of the appraisal is presented to Council for formal approval.

## 3. To the Appraisers (Chair and HRC Chair)

Consider what the Parish Clerk has written in Section 1 and make your comments in Section 2 for discussion at the appraisal interview. Councillors will be emailed to provide feedback, a summary of which should be provided to the Parish Clerk one week prior to the appraisal interview is a key factor in this and should be incorporated in your appraisal and discussions. Concentrate on where there is a need for high challenge or high support in what the Parish Clerk has said. When you have completed the appraisal interview and agreed objectives and the training

and development plan, this should be written up and circulated to the Parish Clerk within a period of 2 working weeks.

#### **4. Appraisal of staff managed by the Parish Clerk**

The Parish Clerk is the line manager for the Gardener, the Lengthsmen and also may manage other staff periodically. The Clerk will conduct regular 1:1s with the staff and an appraisal each year. The process above will be modified by the Clerk and HRC Chair so as not to be too onerous for staff working a limited number of hours.

**PARISH CLERK’S APPRAISAL FORM SECTION 1**

(to be completed by Parish Clerk)

**1. Performance and Job Review**

Use your job description and previously agreed objectives to complete this part of the form. Please review your job description, responsibilities, tasks and targets to ensure their continued relevance.

1.1. What do you feel have been your major achievements in the past year?

1.2. Which parts of your job/objectives have not gone so well?

1.3. How would you describe your overall performance in the past twelve months?

1.4. State any part of your currently approved job description, responsibilities and tasks that you are not doing.

1.5. State any areas of work that you do which are not in your currently approved job description, responsibilities and tasks.

**2. Objective Setting**

2.1. Use your responses in Part 1 and the Council’s aims and objectives (set following the Annual Parish Meeting) to consider what you intend to achieve next year.  
Proposed Objectives:

2.2. Identify what you see as your specific training and/or development needs to enable you to achieve these objectives and further your personal development:

2.3. Describe any particular help and/or support you feel that you need to achieve 2.1 and 2.2:

2.4 Describe ways in which you believe the Council’s services and delivery could be improved:

2.5 Any Other Comments:

Date completed by Parish Clerk:

Date received by Chair and HRC Chair:

**PARISH CLERK’S APPRAISAL FORM SECTION 2**  
(to be completed by Chair and HRC Chair)

**3. Comments**

To be completed in response to Section 1 and including feedback from the Councillors as part of the appraisal interview.

3.1 Comment on identified main achievements (Add anything else that was done particularly well)

3.2 Comment on work or anything else which has not gone well:

3.3. Comment on any tasks that should no longer be in the job description and any that should be included:

3.4 Give your overall assessment of the post holder’s performance during the last twelve months incorporating the feedback from the Councillors (include strengths, weaknesses, and any constraints to their work and the outcome of specific agreed objectives).

**4 Agreed Objectives and Training and Development Plan**

To be completed and agreed as part of the appraisal interview.

There should be no set number of objectives, but they should be SMART (Specific, Measurable, Achievable, Relevant and Time-based) and address the main issues raised in Section 1 and feedback from the Councillors. They should also be demanding enough to stretch the Parish Clerk; have direct relevance to the Council’s aims and objectives or service delivery; include any training, or personal development needed and where possible establish targets for completion. Any objective(s) that have been carried forward from the last appraisal should be noted.

4.1 Objectives:	Target for completion
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4.2 Training and Development Plan:

**PARISH CLERK’S APPRAISAL FORM SECTION 3**

This section provides for the Parish Clerk to comment on the completed section 2 and the appraisal process and the opportunity to raise any issues or concerns that they feel remain outstanding.

**COMMENTS**

(please include any ideas for improving the appraisal process)