



# Todmorden Town Council

## Staff Appraisal Review Training & Development Framework

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## 1 CONTEXT

1.1 Todmorden Town Council delivers the following services:-

- Council Administration and Policy
- Council Communications
- Democratic Support function
- Financial Management
- Health and Safety Management
- Property and Asset Management
- Limited Events Delivery
- Project work

1.2 Each of these areas of activity where volume led, would normally require a degree of professional expertise within each discipline, often at professional qualification level, but because of the financial and staffing resource available, and periodic nature of involvement, a broad degree of understanding is required. Where appropriate external professional advice is needed, this will be sought in an advisory capacity.

1.3 To deal with the current range and variety of work the following areas of competency and knowledge are required to be covered by the current staffing structure with each role involving either responsibility for specific elements or any combination of such elements.

- Strategic Direction
- Policy Development
- Risk Management
- Legal and Technical knowledge of local Council administration and legislation.
- Management of Employees
- Financial and Accounting knowledge
- Health and Safety at Work.
- Effective processes and systems
- Customer contact/correspondence
- Tender and Contract writing/Commercial contract negotiation
- Estate Management
- Event Management and Safety
- Management of Contracts
- Social Media use
- Marketing and Communications

## 2 NEED FOR APPRAISALS

- 2.1 The most important asset that a Council has is its employees. The successful operation of Todmorden Town Council depends primarily on using the full potential of its workforce.
- 2.2 The interests of the Town Council, its Members, Precept Payers and end users are best served by a workforce, which as individuals and a team, carry out their tasks to the most effective performance level and should be working together to help employees be better equipped for his/her present or future roles within the Town Council
- 2.3 This policy has been produced to inform employees of what appraisals are, why they are needed and what the procedures are in operating an appraisal scheme.
- 2.4 It identifies all aspects of the appraisal scheme, particularly the input by employees in the completion of a Preparation for Appraisal Form (Self- Appraisal) prior to the appraisal interview.
- 2.5 The purpose of an appraisal scheme is a recognition by the employer of the need to maximise the use of its human resources, to aid the development of its employees and the business.
- 2.6 This necessitates certain criteria being met which are to the benefit of both the employee, and the employer and requires a strategy to be put in operation to achieve this aim. This is what performance appraisals are seeking to achieve and why they can have an impact on employees and Council performance.
- 2.7 Managers or those in Supervisory roles and support staff must be aware of the requirements of the individual job. This is best served by having a Job Description for each job.
- 2.8 Managers or those in Supervisory roles must be able to identify the development needs of the Town council and their employees. To meet this aim there is a requirement to carry out a formal appraisal scheme.
- 2.9 Appraisals should be made up of four elements, namely:

<b>Preparation for appraisals</b>	By employee
<b>Appraisal form completion</b>	By appraiser
<b>Appraisal interview</b>	Appraiser and employee
<b>Actions plans</b>	Agreed between appraiser and employee

### **3 BENEFITS OF APPRAISALS**

- 3.1 Appraisals record an assessment of an employee's performance, potential and development needs. They are an opportunity for discussion to take place regularly, in a formal manner, on the overall view of work, content and volume and to review what has been achieved during the last appraisal period and to agree objectives for the next.
- 3.2 Appraisals are not implemented solely for the benefit of the individual but are a means of improving the performance of the whole Town Council. By improving all round job performance, job satisfaction, improved communication and understanding, increased awareness and participation, better planning and co-ordination, the business will be able to provide an improved service for our clients.

3.3 It will also assist in developing employees for future roles within the council, especially in times of growth.

#### 4. **WHY DO APPRAISALS**

4.1 The most potent factor in achieving our overall objective is the development and maintenance of an open relationship between colleagues who manage / are managed, and a need to summarise this in a formal way, by ensuring that job performance is actively considered through a formal appraisal process.

4.2 The system of appraisal will provide the means to jointly review employee performance and in doing so it will:

- Help improve future job performance by identifying strengths and weaknesses and determining how strengths can best be utilised and how weaknesses can be overcome.
- Help reveal problems which may be restricting progress and causing inefficient work practices.
- Encourage regular dialogue about work performance which will result in improved communications and clearer direction.
- Develop a greater degree of consistency by ensuring that there are formal meetings and the opportunity regularly to discuss performance and potential.
- Assist succession planning and determine suitability for promotion.

4.2 The purpose of this scheme is to:

- Ensure an understanding and awareness of the objectives of the Town Council, and the barriers preventing their achievement.
- Develop a knowledge and agreement of what is expected from employees and how their contribution fits into the organisation.
- Review employee's performance, giving a formal opportunity to discuss progress and identify improvements and build on strengths.
- Review potential development needs and to predict employee's future capabilities and how these can be developed.
- Review progression and to assess employee's eligibility to achieve promotion.
- Develop employees so that job satisfaction and job performance is maximised, thus increasing effectiveness and efficiency resulting in the provision of an improved service for our clients/customers.
- Ensure the workforce is used in the most effective way.

#### 5 **DETERMINING LEVEL OF EXPERTISE REQUIRED OF STAFF**

5.1 The requirements of the post to be filled, will by their varying nature, be unique and relate to the specific requirements of Todmorden Town Council and the emerging range and variety of services it may subsequently deliver.

5.2 Job Description and Person specifications will be drawn up relative to the perceived requirements of the job, and relate to three general categories

- Senior Staff
  - Town Clerk/ Responsible Financial Officer
- Middle Management
  - Assistant Town Clerk
- Support

- Administrative Officer
- Climate Officer

- 5.3 If new services are taken on, where a new role can be justified on economic grounds, it may be necessary to expect new services and their delivery requirements to be added to existing roles and responsibilities.
- 5.4 Where it is clear that it is not simply a volume issue requiring use of existing and transferable skills, but additional responsibility, risk and knowledge, then Todmorden Town Council will seek to recognise this by re-evaluating the current role and will seek to negotiate an appropriate change in employment contract, and review in remuneration, to reflect the increased job specification now relevant to the role and relative to market forces, where clear comparisons can be made.

## 6 RELEVANT JOB LEVELS FOR ASSESSMENT

- 6.1 The range of different job roles involved in the day to day delivery of Town Council business will inevitably mean that areas of competency relevant to one role or group
- 6.2 The range of different job roles involved in the day to day delivery of Town Council business will inevitably mean that areas of competency relevant to one role or group of roles, may not be to another, and therefore to ensure that the review is relevant to the type of role being appraised, a level is indicated within the process to consider whether appropriate to assess at the interview stage.
- 6.3 The levels to be considered are:-

Level	Role	Characteristics
1	Senior Management	Overall Accountability and Responsibility
2	Middle Management	Responsibility for specific areas, Committees and am range of operational delivery
3	Support	Administrative support and limited direct responsibility

## 7 CORE COMPETENCIES/PERSONAL CHARACTERISTICS

- 7.1 In addition to job description related tasks and requirements the nature of involvement at Town Councils a relatively small workforce inevitably means a wide range of duties and responsibilities are often covered within multi-disciplinary roles.
- 7.2 Whilst specific job requirements can be more readily assessed in terms of achievement, there are elements of more general competency, that when recognised, considered and delivered, lead to overall improved performance.
- 7.3 The way by which the Appraisee goes about their daily job is also relevant. Whilst Core Competencies may require further attention, and can be improved upon through training and development, the “Personal Characteristics” of a person will also play an important part in how the appraisee delivers the role

## 7.4 TABLE OF CORE COMPETENCIES AND PERSONAL CHARACTERISTICS

<b>CORE COMPETENCIES</b>	
<b>Competency</b>	<b>Relevant Level(s)</b>
Leadership	1,2
Financial Management and Control- Compliance, control, information, financial health	1,2
People skills- customers, members, relationships, employees (including coaching and motivating)	1,2,3,4
Risk - recognising and managing	1,2,3,4
Supporting and delivering the democratic function, Compliance, Good Governance and Practice, Strategic insight.	1,2,3
Knowledge – Technical, Legal, Systems and Processes	1,2,3,4
Problem solving and responsible decision making	1,2,3,4
Delivery- operational efficiency, client management , change and delivering on commitments.	1,2,3,4,
<b>PERSONAL CHARACTERISTICS</b>	
Flexibility	1,2,3,4
Adaptability	1,2,3,4
Willingness to assume responsibility/accountability	1,2,3
Commitment to role	1,2,3,4
Professionalism / work ethic	1,2,3,4
Self-awareness	1,2,3,4
Building trust	1,2,3,4
Initiative and Independence	1,2,3,4

## 8. FRAMEWORK FOR ASSESSMENT

- 8.1 To ensure an effective and deliverable appraisal process there is a need for the process not to be overcomplicated and for it to focus on the issues that are likely to lead to improvement of the individual and as part of this, contributing to a wider ambition of continually improving how Todmorden Town Council services are delivered for the benefit of the precept payer.
- 8.2 As part of continuing development, an awareness of the key competencies required of all employees should be considered at not only the formal annual appraisal process but also at any interim reviews held in year.
- 8.3 For each of the core competencies there will be sub-sets to be considered in terms of whether these are evidenced or not and a realistic expectation of need relative to the role.
- 8.4 The general expectation is that experienced staff will be expected to deliver at a consistent good level of performance.
- 8.5 A simpler matrix of a table of competencies and scoring of poor, satisfactory, good and excellent will be used as a basis to identify current performance and to identify future areas for improvement.
- 8.6 Against the backdrop of this matrix, that informs current competency levels, and the job description, will be considered

- What are the most important parts of your job?
- Which parts of the job have been done well and why?
- What can be done to build on their strengths?
- What they have not done so well and why?
- What action can be taken to overcome these shortcomings?
- Achievement or non-achievement of their current targets.
- Agreement on their future targets.
- Define an action plan for the future setting further targets.

8.7 The Framework is an aide memoire to enable performance to be reviewed and to help both Appraiser and Appraisee work together to deliver positive outcomes for both individuals and the Town Council as whole. As such there is an expectation that the formal appraisal process should not be the process where serious shortcomings in performance are first raised.

## **9 THE PROCEDURE**

9.1 The person who is responsible for conducting the appraisal (the Appraiser) will: -

- Ensure the appraisee has a copy of the required documentation and suggest that they read it thoroughly.
- Give the appraisee a Preparation for Appraisal Form, asking for it to be completed and returned within two weeks.
- Give any further guidance or clarification on any aspect of the appraisal scheme which may be required.
- Arrange a mutually convenient date, time and place for the appraisal interview (about four weeks after the Preparation for Appraisal Form is returned to the Appraiser).

9.2 The appraisee needs to complete the Preparation for Appraisal Form and return this as agreed to the Appraiser.

9.3 The appraisal interview will be conducted, and the Performance Appraisal Form completed. Amendments to the job description can also be discussed and considered at this time.

9.4 After the appraisal interview the outcome will be put in writing including any objectives for the next period. This will be saved on file for future reference with the completed appraisal form.

9.5 If any dates are specified on the Action Plan Letter with regards actions you should meet with your Appraiser, and together review the agreed actions.



## **10 PREPARATIONS FOR APPRAISAL**

- 10.1 Before completing the Preparation for Appraisal Form, all parties should read the "explanatory notes" on the front page of the form
- 10.2 The benefits of completing the Preparation for Appraisal Form fully and frankly are considerable and forms the basis for your appraisal interview as to what the job is really about, how it is performed, and what needs to be done by both Appraisee, and Appraiser.
- 10.3 It helps both parties to get to know each other better, and to help each other with common problems. This is only true if the Preparation for Appraisal Form is fully and frankly completed. It is an opportunity to express how you both think the Appraisee has performed. Parties may not agree on the answers to the questions on the Preparation for Appraisal Form, but both parties, at least, are thinking about the same questions, especially as the Performance Appraisal Form is in the same format and the same details will be discussed during the appraisal interview.
- 10.4 There is an opportunity to influence the Appraiser's judgement of performance. The comments on the Preparation for Appraisal Form may give the Appraiser new information or lead to a fresh consideration of performance levels (either generally or in some particular matter).
- 10.5 Remember the Appraisal is for benefit now and in the future, so it is in the Appraisee's interests to be frank and honest about performance. If that means indicating weakness in performance so be it with an expectation that support will be given to help to improve.

## **11. HOW TO COMPLETE THE PREPARATION FORM**

- 11.1 The Appraisee may feel that the job as described in the job description is not accurate or up to date, the appraisal interview provides an ideal opportunity to talk about and consideration given to updating the Job Description.

### **11.1.1 Question 1**

The appraisee is asked to think about and write down what has been done well over the past year. Initially, think about the most important areas of the job, but may also consider that a particular task, not directly within these areas, was accomplished well. This should be noted down.

To further identify things which have been done well, think back to achieving personal satisfaction or receiving some kind of praise or recognition, or met a particularly difficult deadline when under pressure, etc.

- 11.1.2 The second part of this question may require deeper thought. Think about why performance was good in the areas previously identified. Consider how this was tackled, what skills were needed, what difficulties had to be overcome, and how eventually results were accomplished. Do not be loath to "blow your own trumpet". It is important that both Appraisee and Appraiser are aware of your strengths.

### **11.2 Question 2**

- 11.2.1 To answer this question about what areas of the job could have been done better over the past year, think initially about the most important areas of the job. Consider also other tasks or occasions that

were not involved with these important areas and note them down if they could have been better achieved.

11.2.2 The second part of this question asks what prevented the Appraisee from performing better in those areas identified. Some possible reasons maybe another person's or department's influence, lack of knowledge, time constraints, relationship with others, rules, etc. These are possible suggestions to help identify the things preventing a better performance. Think about all the things which affect job, including people (Appraiser, peers and subordinates), training to date, department and council processes and procedures and any other matters preventing good performance. etc.

### **11.3 Question 3**

11.3.1 This final question looks to the future. It asks you to suggest how performance can be improved. These future actions may relate to the Appraisee, your Appraiser, the council, or anyone else. Again, try to think beyond, and consider every aspect of the job and the environment which could have had an influence on performance.

11.3.2 It is particularly important when considering the answers to Questions 2 and 3 that exactly what is thought, however unrealistic, unimportant or unmentionable these thoughts may be. The Appraiser needs knowledge and experience of the job difficulties and needs help in trying to agree how to overcome them.

11.3.4 When the Preparation for Appraisal form is completed remember that the appraisal is a joint process between Appraisee/ Appraiser. Preparation for Appraisal Form is part of that process. It can contribute significantly if it is completed fully and in an open committed manner.

11.3.5 The particular questions on the Form confine themselves to looking at strengths and weaknesses, and future action on them, but space is also provided on the Preparation for Appraisal Form to make a note of any other topics to be raised during the appraisal interview.

### **11.4 Question 4**

11.4.1 To answer this question about which areas of the Appraisee's job could have been done better over the past year, you should think initially about the most important areas of the job. You should also consider particular tasks or occasions not involved with these important areas and note them down if you feel they could have been better achieved.

### **11.5 Question 5**

11.5.1 This question asks what prevented the employee from performing better in those areas which you have identified in Question 2a. This may be because of another person's or department's influence, his/her lack of knowledge, time constraints, relationship with you, others or Council rules, etc. These are possible suggestions to help you identify the things preventing a better performance. You need to think about all the things which affect the employee and his/her job, including people (your Manager, you and subordinates), training he/she has received to date, department and Council matters, etc.

### **11.6 Question 6**

11.6.1 This question looks to the future. It asks you to suggest how the things mentioned in Question 2b can be overcome. These future actions may relate to yourself, your employee, the Council, or anyone

else. Again, you should try to consider every aspect of the job, environment and influence on performance.

11.6.2 The appraisal is a joint process between you and the employee. The Preparation for Appraisal Form is part of that process. It can contribute significantly if it is completed fully and in an open committed manner

## **12 THE APPRAISAL INTERVIEW AND COMPLETION OF PERFORMANCE APPRAISAL FORM**

12.1 The appraisal interview should be a FRANK and OPEN DISCUSSION. It should not be a stressful, highly pressurised situation where the parties involved are unaware of the objectives of the interview. The interview should be a discussion with several purposes. These are:

To agree what the job is really about.

To discuss job performance

Identify strengths, and ways of building on them for the benefit of all

Identify shortcomings, and ways of overcoming them

To discuss the overall grading of performance

12.3 The appraisal interview revolves around the completion of the Performance Appraisal Form by the Appraiser. The Appraiser may ask the Appraisee to sign the form to signify that you "the appraisal has been discussed " at the conclusion of the interview. The Performance Appraisal Form may be completed in pencil and notes made during the interview, with the form being formally completed afterwards. Appraisee and Appraiser will then briefly meet again for the form to be signed.

12.4 Sections 1 and 2 of the Performance Appraisal Form correspond to the questions on the Preparation for Appraisal Form. Completion of these sections follows from the discussions and provides the basis for the agreed future action plan.

12.5 The third section of the form is the overall grading of performance. Having carefully considered his/her own and the Appraisee view of job performance, the Appraiser will decide which of the ratings most accurately reflects and summarises the work over that year/period under review.

12.6 It is important to understand exactly what the ratings mean, their definitions, and how they relate to an individual's performance, the department and the council. The overall performance is evaluated on a four -point scale related to degrees of effectiveness (the fifth box applies to new employees or those who have been in the current job for less than three months).

12.7 Normally, about 60% of the Council's employees would be rated in the second box - "Effective" (B). The meaning of this rating is important. It does not mean "average", "satisfactory" or a performance which is less than worthwhile. It means that the Employee is "EFFECTIVE AND MAKING A POSITIVE AND VALUABLE CONTRIBUTION". To attain this standard of performance means that he/she is performing his/her total job in a competent and altogether effective manner and is a valuable asset to the department and Council.

12.8 Both parties may feel that training could provide some specific assistance to improve or build on performance. This should be indicated in Section 4 of the Performance Appraisal Form.

12.9 Section 5 of the Performance Appraisal Form is provided for the Appraisee to make any comments about the appraisal. The appraisee may record anything you feel regarding the discussion, the rating or any aspect of the appraisal process.

12.10 The Appraisee is required to sign the Performance Appraisal Form to confirm that the Appraisee "has seen and discussed this appraisal". If the Appraisee wishes to discuss the appraisal further, then a further interview with your Appraiser or one with your Appraiser's Manager (Chair of Staffing Committee if the Appraiser is the Town Clerk) may be requested.

### 13 THE PERFORMANCE RATING

13.1 There are five rating columns as follows:

- A) **OUTSTANDING PERFORMANCE** - the employee has consistently had an outstanding performance in all aspects of this task.
- B) **MORE THAN EFFECTIVE PERFORMANCE** - the employee has consistently performed more than effectively in most aspects of this task.
- C) **EFFECTIVE PERFORMANCE** - the employee has consistently performed in all aspects of the task performed at an effective rate
- D) **PARTIALLY EFFECTIVE PERFORMANCE** - the employee has generally performed effectively but some aspects of task require improvement.
- X) Too early to assess (review in 6 months)

13.2 There should be nothing raised as part of this process that relates to areas of somewhat effective performance that have not been raised before. Any less than effective performance should have already been dealt with poor performance measures and if appropriate thought the disciplinary process.

### 14 TRAINING AND DEVELOPMENT

14.1 The review should consider how areas of performance could be improved and to do so what training or development needs could be considered to help achieve this.

14.2 There is significant cost to training and therefore a real need must be identified relevant to the role being carried out at the time and how it will benefit the organisation.

14.3 Priority initially will be given to helping improve functionality of delivery. Provision will focus on technical areas of knowledge that will improve the officer's understanding and on doing so to help protect the Council's reputation and or save money through improved delivery application. Such courses will likely to be of a practical nature and process led.

14.4 Opportunities for development will be limited given the current structure of the organisation where opportunity to progress career wise is limited. Where budget allows, and officer performance is at least of a good level, consideration will be given to investing in officer's future potential through more management style-based courses.

14.5 A financial contribution may be required for management type courses where there is no immediately identified need for such development to carry out the duties required of the current role undertaken. Clawback arrangements of any Council financial contribution made will also apply should that officer obtain the qualification and seek employment elsewhere on scale of:-

- 100% - within one year of funding
- 75% - between one and two years of funding
- 50% - between two and three years of funding

After three years no clawback will be required.

## 15 PERFORMANCE AWARDS

- 15.1 When a vacancy is advertised a pay range is attributed to the position being sought. based on NJC pay scales. It would be normal for the starting level to be on the lowest level with any level above awarded based on experience and ability to carry out the role sought effectively, immediately and with minimum requirement for additional training and development other than with bespoke systems.
- 15.2 Where this is below the maximum advertised, any award for effective performance and above will be consolidated into the base salary until such time as the maximum salary is reached for that role.
- 15.3 An effective performance would normally result in an increase in base salary. More than effective/outstanding may lead to movement to top of scale.
- 15.4 It would be normal for an annual increase to be made based on national increases in pay bands related to NJC negotiations.
- 15.5 Once the maximum level of pay is reached there is normally no room to increase such pay without promotion. The nature of small teams and significant levels of experience and knowledge necessary to attain the next level may be significant, leading to those wishing to progress to the next level to seek employment outside of the organisation.
- 15.6 The impact of losing good performing staff on the organisation is costly and therefore to add some motivational factor to stay, and to recognise more than effective and outstanding performance, a performance enhancement is proposed of

More than effective	1.5 % above base level
Outstanding	3% above base level

- 15.7 Any performance related reward is not consolidated into the base level of salary and therefore is paid as an additional award on the base salary ( which itself may have been increased through national awards in the meantime).
- 15.8 The presumption in marking by Appraisers is that good performance will result in a C being given and that the employee has consistently performed in all tasks at an effective level.
- 15.9 Award at level B or A will require all markings at a minimum level C and the majority above at the requisite levels being achieved.

## 16 AFTER THE INTERVIEW

- 16.1 Action Plan Letter  
This should be completed by the Appraiser, either fully or in draft form, during the appraisal interview. In either case, you will receive a completed copy during or after the interview.

16.2 Normally its contents will be a summary and written confirmation of the future actions agreed upon, by both parties, during the discussion on "strengths" and "shortcomings". The letter also contains dates throughout the year, when both parties should jointly review progress on the contents of this Action Plan Letter. This should facilitate that the formal discussion of performance ceases to be just an annual event and becomes more continuous and developing process between both parties.

### 16.3 Agreed Targets & Objectives

If not already working to an Action Plan, the Appraisee will receive a blank copy of the Agreed Action Plan, with the Action Plan Letter.

The Appraiser should then explain the philosophy and mechanics of the form to you, and possibly discuss in general terms targets/objectives. The form should be roughly completed before a further meeting is arranged to discuss, amend if necessary, and jointly formulate the Action Plan. Remember to use a previously completed Action Plan as the basis if available.

16.4 Reviewing and updating these targets provides another occasion for both parties to meet and discuss performance.

16.5 Through these means - the Preparation for Appraisal Form, the Appraisal Interview, the Action Plan Letter and the Agreed Action Plan Forms, with follow-up and revision during the year - a combined effort can be made by both parties to build on job strengths and to overcome any shortcomings. Both can through this process ensure that the overall objective of our appraisal scheme is achieved, namely "to improve current and future job performance and, thereby, the performance of the council".

**FORMS**

**PREP1**

# Preparation for Appraisal

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<b>Appraisee Name:</b>	<b>Date of Appraisal:</b>
<b>Position:</b>	<b>Level for Competency</b>

The comments you make on this form are to assist in your appraisal.

On the Appraisal Form itself a space is provided for you to make any comment you may wish regarding your appraisal.

If you disagree with the outcome or are unhappy with your appraisal, discuss with your Manager for the appropriate action to be taken.

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Please consider your performance during the period under review and complete the following: -

<b>Which parts of the job have you performed best? How did you achieve this?</b>

**Which parts of the job have you performed less well? Were there any circumstances which prevented a better performance?**

**What could or should be done by you, your Appraiser, the Council, or anyone else to help improve your performance in any way:**



**Notes to bring to the Appraisal interview:**

# Job Role / Task Performance Table

Appraiser Name

Appraiser Position

CORE COMPETENCIES		A	B	C	D	X
Competency	Level(s) relevant to					
Leadership	1,2					
Financial Management and Control	1,2					
People skills- customers, members, relationships, employees (including coaching and motivating)	1,2,3,4					
Risk - recognising and managing	1,2,3,4					
Supporting and delivering the democratic function	1,2,3					
Knowledge – Technical, Legal, Systems and Processes	1,2,3,4					
Problem solving and responsible decision making	1,2,3,4					
Delivering change and on commitments	1,2,3,4,					
PERSONAL CHARACTERISTICS						
Flexibility	1,2,3,4					
Adaptability	1,2,3,4					
Willingness to assume responsibility/accountability	1,2,3					
Commitment to role	1,2,3,4					
Professionalism / work ethic	1,2,3,4					
Self-awareness	1,2,3,4					
Building trust	1,2,3,4					
Initiative and Independence	1,2,3,4					
<b>TOTALS</b>						

## Rating

- A** Constantly gives an outstanding performance in all aspects of task.
- B** Has consistently performed more than effectively in most aspects of task.
- C** Has consistently performed all aspects of task effectively.
- D** Has generally performed effectively but some aspects of task require improvement.
- X** Too early to assess (review in 6 months)

# Performance Appraisal

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Confidential – To be completed by appraiser

<b>Appraisee Name:</b>	<b>Date of Appraisal:</b>
<b>Position:</b>	<b>Relevant level of Competency</b>
<b>Appraiser Name</b>	<b>Appraiser Position</b>

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## REVIEW OF PERFORMANCE

Consider the job holder’s results in his/her work in general over the last year, relating, in particular, to agreed targets/objectives/standards of performance, and to existing job description.

<b>Which parts of the job has the Appraisee performed most effectively?</b>

**How has this been achieved?**

**What action will be taken to build on the above strengths?**

**What parts of the job could have been done better?**

**Why was this?**

**What action will be taken to overcome the above difficulties?**

## Overall Grading of Performance

From your evaluation against the main tasks of the job description and the markings on the Job Task Performance Table, indicate the overall performance achieved by the job holder. Bear in mind particularly the definitions of the ratings. The assessment should reflect the performance actually achieved in the circumstances which prevailed. Any unusual/special factors governing the year's performance should be stated below the assessment.

- A** - Constantly gives an outstanding performance in most areas of their job.
- B** - Constantly gives more than an effective performance in most areas of their job.
- C** - Gives an effective performance
- D** - Sometimes gives an effective performance but some improvement required in many areas of their job (review in six months).
- X** – Too early to assess (review in six months).

**ALL APPRAISER SHOULD NOW COMPLETE THE AGREED ACTION PLAN LETTER**

### The following training and other action will be taken:

### Employees Comments will be taken:

The space below is provided for the employee to make any comment he/she may wish with regard to the appraisal:

**Employee Signature:**

**Date:**

**Appraiser Signature:**

**Date:**



ACT01

# Action Plan Monitoring

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<b>Name:</b>

<b>Date of Appraisal Interview:</b>

<b>Period for Review</b>

Details of Action	Interim/Follow Up	Date	Target Date



**Following Appraisal Interview**

Dear **#INSERT NAME#**,

During the discussion reviewing your performance on **#INSERT DATE#** we each agreed to commit ourselves to an action plan aimed at maximising the effectiveness of your role within the council.

**I agreed to:**

**You agreed that you would:**

**This will be reviewed periodically to ensure:**

We also briefly discussed what your job objectives should be for the coming year, and as indicated, I now require you to complete the enclosed Action Plan Form (Form ACT01) in light of the things we said and to meet with me to discuss them, on **#INSERT DATE#**.

**Signed:**

Appraiser

TD1

# TRAINING DEVELOPMENT/APPLICATION

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<b>Name:</b>

<b>Date of Appraisal Interview:</b>

<b>Period for Review</b>

<b>TRAINING IDENTIFIED</b>	<b>Provider</b>	<b>COST</b>	<b>Target Date</b>
<b>AUTHORISATION</b>			
<b>Authorised by:</b>	<b>Budget code: -</b>		