SOUTH HANNINGFIELD PARISH COUNCIL

PERFORMANCE MANAGEMENT POLICY – OBJECTIVE SETTING AND PERFORMANCE APPRAISAL

Effective performance management requires that:

- Employees are set agreed objectives and their performance measured against these objectives
- Where performance does not meet expectations, that the matter is handled in an appropriate manner
- Objective setting and performance appraisal are described in this Objective Setting and Performance Appraisal Policy
- The policy and process for dealing with employee under-performance are described in the Council's Employee Capability Policy

1. Policy Guidelines

1.1 Performance management requires that employees:

- know and understand what is expected of them
- know the standards of performance required
- have the skills and ability to deliver on these expectations,
- are supported in developing the capability to meet these expectations,
- are given feedback on their performance
- know whether there are performance problems and what to do about them

1.2 The Human Resources Committee is responsible for maintaining and reviewing this policy (in line with changes in legislation)

1.3 An employee's Line Manager is responsible for ensuring that the overall process and implementation of this process is carried out. Specifically, this includes:

- agreeing objectives and development needs with individual employees
- review individual performance against objectives throughout the year
- give feedback and discuss amendments to individual objectives as circumstances change
- agree the skills and behaviours necessary to do the job
- help employees achieve objectives through support and training or other development opportunities,
- manage unsatisfactory performance
- hold an annual appraisal review with employees and write an appraisal report, supplemented with an interim six-month review and ad hoc review meetings.

1.4 Where employees do not meet expectations the Line Manager should invoke other Council procedures as appropriate (e. g. Capability or Disciplinary Procedures).

2. Agreeing Individual Objectives

2.1 Objectives should be agreed against the employee's role plus any special projects that the individual may be required to carry out.

2.2 Objectives should be SMART:

- Specific – objectives should state the desired outcomes to be achieved by the employee
- Measurable – objectives should detail how employees will know they have been achieved
- Achievable – the objective should be something the employee is capable of achieving
- Relevant - objectives that relate to the those of Council.
- Timebound – a date when the objectives need to be achieved by.

3 . Appraisal Overview

3.1 An appraisal is a structured conversation between the employee and his or her manager, that takes place either as a check on progress following first employment, or as routine and regular monitoring of an employees' work and work context during employment. Appraisals will be recorded in writing, agreed by both parties, and become part of the employee's personal record.

3.2 Appraisals have two main objectives:

- For the Line Manager to objectively assess the contribution made by the employee and to identify any necessary support required (e .g. training) should problems or obstacles to performance be identified.
- To provide the employee with a non-threatening and supportive environment in which to voice and discuss achievements, together with concerns, difficulties or other factors that can help him or her carry out the role more effectively.

4. Appraisal Process

4.1 A mutually agreeable date for appraisal will be set between the manager and the employee. Normally at least two weeks' notice should be given to the employee in order that time is allowed for thought and preparation.

4.2 The Appraisal session is normally conducted as a one-to-one confidential conversation between the manager and the employee. With the consent of the employee a member of the Parish Council HR Committee may also be present in support of both manager and employee.

4.3 At the Appraisal the manager will review performance against the employee's objectives, including both what was achieved and the employee's behaviours in how they were achieved. Training and development needs will also be addressed.

4.4 Appraisal outcomes will be formally assessed in terms of overall employee performance as either (a) Excellent, (b) Acceptable or (c) Unacceptable.

4.5 Employee Appraisal Record Form (see appendix) will be used to record the outcome of the discussions.

4.6 New objectives will normally be discussed and agreed, with timescales for completion for monitoring at future Appraisal meetings. For certain job types objective setting may not be appropriate.

4.7 After the completion of the Appraisal session the manager will complete a fair copy of Employee Appraisal Record Form and discuss and agree the findings with the HR Committee, together with the Assessment Level.

4.8 After agreement of the draft Employee Appraisal Record Form with the HRC the draft Form will be given to the employee for comment and agreement. Any corrections of fact will be made to the form and, when both parties agree the content, they will sign and date two copies as approved.

4.9 One copy of the form will be placed in the employee's personal file and a second copy given to the employee for reference.

4.10 The Employee Appraisal Record Form, when completed, is a confidential document and is only shared with members of the HRC. Other Parish Councillors are not permitted to see the information.

4.11 If as a result of the Appraisal process persistent difficulties arise with performance or employee capability, further action may be taken through the Employee Capability Policy and Procedure.

5. New Employees

5.1 On employment with the Parish Council the new employee contract will clearly state that a performance review and appraisal will be carried out on or before the first six months service point. Some specific goals or targets might be set on employment that will also be reviewed at the initial appraisal, although the setting of goals is dependent on circumstances and the role to be filled. The first six months therefore operates as an employment probationary period.

Appraisals will be carried out according to the policy guidelines as set out in Section 1 above.

5.2 Subject to a satisfactory initial appraisal review (Acceptable Performance) the employee contract status will be confirmed as permanent.

5.3 If the review shows a less than Acceptable Performance the manager will decide if employment should continue. Agreed steps can be taken to develop the employee so that Acceptable Performance is reached. In these circumstances the probation period can be extended. Alternatively, a decision could follow that the employment is terminated at the six-month point.

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