

AKELEY PARISH COUNCIL

Appraisal Policy and Protocol

PARISH CLERK'S APPRAISAL FORM

Adopted by Akeley parish Council on December 2020
Confirmed 17th May 2021

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 Akeley Parish Council through encouraging the Parish Clerk to achieve high standards of performance.
- To help the Parish Clerk develop to their fullest attainable level of potential and achieve job satisfaction.

Interview date:

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 electric copy to the Chairman and Vice Chairman

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 to the Chairman and Vice Chairman two weeks before this date in order that the Chairman and Vice Chairman have adequate time to review this and consider the completion of section 2.

At the appraisal interview you will jointly agree with the Chairman and Vice Chairman 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 these are presented to Council for formal approval.

To the Appraisers (Chairman and Vice Chairman of the Council)

Consider what the Parish Clerk has written in Section 1 and make your comments in Section 2 for discussion at the appraisal interview. The results of the Councillors' survey, 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.

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 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 Chairman/Vice Chairman:

PARISH CLERK'S APPRAISAL FORM SECTION 2
(to be completed by Chairman and Vice Chairman)

3. Comments

To be completed in response to Section 1 and with the assistance of the results of the Councillors survey 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 results of the Councillors survey (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 reasonable and attainable and address the main issues raised in section 1 and by the Councillors survey. 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

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)

Chairman and Vice Chairman's response to comments in Section 3 above with any proposed actions

Signing Off

To be completed when Objectives and Training Plan approved by Council.

Signature of:

Chairman

Date

Vice Chairman/Other Councillor Present Date:

Date:

Signature of Parish Clerk:

Date:

Parish Clerk Councillor Survey Form

General Responsibilities – please add comments on how you feel the clerk has achieved to each responsibility as required.

1. To ensure that statutory and other provisions governing or affecting the running of the Council are observed.
2. To monitor and balance the Council's accounts and prepare records for audit purposes and VAT.
3. To ensure that the Council's obligations for Risk Assessment are properly met.
4. To prepare, in consultation with appropriate Members, agendas for meetings of the Council and Committees. To attend such meetings and prepare minutes for approval.
5. To attend all meetings of the Council.
6. To receive correspondence and documents on behalf of the Council and to deal with the correspondence or documents or bring such items to the attention of the Council. To issue correspondence as a result of instructions of, or the known policy of the Council.
7. To receive and report on invoices for goods and services to be paid for by the Council and to ensure such accounts are met. To issue invoices on behalf of the Council for goods and services and to ensure payment is received.
8. To study reports and other data on activities of the Council and on matters bearing on those activities. Where appropriate, to discuss such matters with administrators and specialists in particular fields and to produce reports for circulation and discussion by the Council.
9. To draw up both on his/her own initiative and as a result of suggestions by Councillors proposals for consideration by the Council and to advise on practicability and likely effects of specific courses of action.

10. To Supervise any other members of staff as their line manager in keeping with the policies of the Council and to undertake all necessary activities in connection with the management of salaries, conditions of employment and work of other staff.
11. To monitor the implemented policies of the Council to ensure they are achieving the desired result and where appropriate suggest modifications.
12. To act as the representative of the Council as required
13. To issue notices and prepare agendas and minutes for the Parish Meeting: to attend the assemblies of the Parish Meeting and to implement the decisions made at the assemblies that are agreed by the Council.
14. To prepare, in consultation with the Chairman, press releases about the activities of, or decisions of, the Council.
15. To attend training courses or seminars on the work and role of the Parish Clerk as required by the Council.
16. To work towards the achievement of the status of Qualified Clerk as a minimum requirement for effectiveness in the position of Clerk to the Council.
17. To continue to acquire the necessary professional knowledge required for the efficient management of the affairs of the Council: Suggested is membership of your professional body The Society of Local Council Clerks.
18. To attend the Conference of the Buckinghamshire Association of Local Councils, Society of Local Council Clerk's, and other relevant bodies, as a representative of the Council as required.

General Comments

Strengths

Weaknesses

If you have any comments or ideas on how the Parish Clerk may improve their service to the Council please enter them in the space below.

If you have any specific projects or tasks you would like to see completed by the Parish Clerk over the next year please enter these in the space below.

Signature	Name Date:
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