

Crowborough Town Council

Performance Management Scheme - November 2008

Purpose of the scheme

1. Crowborough Town Council recognises the benefits of regular and constructive performance review and is committed to ensuring that staff are provided with support to enable them to work as effectively as possible.
2. One of the ways in which such support can be provided is through the performance management scheme, which provides a systematic opportunity to:
 - recognise the achievements of staff over the previous year
 - identify ways in which performance can be improved to the benefit of both the individual and the organisation
 - agree performance objectives and targets for the coming year
 - identify development/training needs and prepare a personal development plan.
3. Individual performance will be reviewed on at least an annual basis, plus an interim review carried out six months after the main review.

The performance review year

4. Performance will be reviewed at the end of the municipal year i.e. during April. Objectives will be set following the election of the Council in May annually. The follow up review will take place during October, with twice yearly reports to the Personnel committee. All appraisal documents should be signed and it is the signed copy only that is accepted. The Town Clerk objectives only will be reported to Full Council and not the whole appraisal document..

Who reviews?

5. The review will normally be carried out by the immediate line manager. The Town Clerk will be reviewed by an independent facilitator [in this case Sheila Keogh minute 5686] in the presence of the Chairman of Personnel (Cllr Anita Kerwin-Nye) and one other Councillor (this year either Cllr George Moss or Cllr Mark Symons). The Town Clerk will monitor all appraisals for completion and consistency and will report the outcome of this monitoring to the Personnel Committee. Appraisals will be reviewed by the Chairman of the Personnel Committee. [] refers to current year. In future this will state "The Town Clerk will be reviewed by an independent facilitator in the presence of two Members of the Personnel Committee qualified and experienced in conducting appraisals."
6. The role of the Town Clerk is to ensure that a robust review process has taken place for all staff, to monitor consistency of approach and serve as a point of reference and, if necessary, appeal for any member of staff who has concerns at the outcome of the appraisal review.

Preparation for the review

7. For performance review to be successful and effective it is essential that both the reviewer and the employee prepare. A date should be set for the review meeting at least 2 weeks prior to the discussion taking place. The supporting paper work including the record from the previous year's review, the part year review and the objectives must be provided to the employee when setting the date.

The job description

8. While the job description will often be reviewed as part of this process, in order to ensure it is a clear reflection of the role, it is not intended that grades will be changed unless there is substantial, material and permanent change.

General job performance

9. It is recognised that all jobs are formed of both a number of specific objectives and general job performance such as planning and prioritising the workload, communicating appropriately, working collaboratively with others and being flexible and adaptable. All aspects of the job will be reviewed.

Personal development

10. In order to continue to carry out their role and to meet new objectives it is recognised that from time to time employees will need further personal development. Personal development is not simply about attending training courses. Development and training opportunities can be provided by a variety of means, but they should be realistic for both the individual and the Town Council, whilst taking into account operational requirements. Opportunities may include:

- ⇒ on or off job coaching
- ⇒ mentoring
- ⇒ shadowing other staff
- ⇒ taking on new responsibilities
- ⇒ undertaking project work or contributing to working parties
- ⇒ professional updating
- ⇒ attending conferences, seminars and symposia
- ⇒ training courses and workshops
- ⇒ guided reading
- ⇒ networking
- ⇒ audio and video tapes
- ⇒ e-learning

Confidentiality

11. The content of the review will normally be confidential between the reviewer and the employee, although the Main Record of Discussion will be reviewed by the Town Clerk who will retain the forms for personal files and use the information to prepare the training plan.

Responsibility for the Scheme

12. Line managers are responsible for preparing and carrying out reviews and setting objectives in a timely and consistent manner. They are also responsible for following up agreed action.
13. Responsibility for monitoring the process and ensuring it is carried out consistently, rests with the Town Clerk. The Personnel Committee will monitor progress to ensure all review discussions and mini-reviews are carried out at the appropriate times and that agreed personal development is carried out.

Conclusion

- 14 The aim of the review process is not to 'fill in forms' but to encourage positive communication between staff and managers, leading to better communication within teams and throughout the organisation. Staff development produces positive results in increased motivation and skills and a fuller understanding of a member of staff's role in contributing to the achievement of Crowborough Town Council's aims. This in turn produces a more effectively operating organisation and a positive benefit for all concerned.

Appendix 1

Structure of the meeting

The following structure should be followed at the review meeting:

Looking back:

- Reviewing progress against last year's objectives
- Recognising achievements over the period
- Identifying ways in which general performance can be improved to the benefit of both the Town Council and the employee
- Clarifying the role and reviewing the job description to ascertain if it needs updating
- Giving specific feedback, both constructive and developmental.

Looking forward:

- Discussing performance objectives and general job performance for the coming period
- Agreeing a range of objectives, including success criteria

Agreeing personal development

- Identifying development or training needed for the attainment of agreed objectives

Other issues

- Use this process to discuss any other issues affecting the job, for example the manager's style and approach, team working, job satisfaction.
- This process provides an opportunity to discuss possible ways of alleviating any matters giving rise to unacceptable stress and to identify sources of help and advice.

General

The employee and their line manager should communicate regularly during the review year to discuss the achievement of objectives and general job performance, so that performance management is an integrated and continuous process. It is essential that all employees' efforts are directed towards the success of the whole team and the organisation.

Following the discussion

After the discussion, the line manager will complete the Main Record of Discussion Form and pass to the employee to sign that they agree it is a true and accurate record of the discussion. The form will then be passed to the Town Clerk, or retained by her/him where she/he has carried out the review for monitoring purposes. The form will then be placed on the personal file.

Crowborough Town Council

Appendix 2

REVIEW PREPARATION FORM- EMPLOYEE

This form is designed to help you to prepare for your review discussion. You should have received it at least two weeks in advance of the date of the review meeting. You should take it to the meeting with you. It will help you to organise your thoughts beforehand and ensure that you cover everything that is important to you.

Looking back

Which parts of your job do you feel you have done particularly well? Why?
Which parts do you feel have not gone so well? Can you say why?
Comment on how well you have progressed through your work programme and objectives.
What new skills or knowledge have you acquired over the period? How have you used this in your job?
Is your job description up to date and a clear reflection of your role?

Thinking ahead

What objectives do you think should be set for the next year?
What should the timescales be and how will you know when you have been successful?

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.

Personal development

What learning or training do you think you might need to enable you to achieve these objectives? How could this be provided? Do you have any personal development needs?

- 14.

Giving feedback

Note anything else that you want to raise e.g. general job performance, management styles and approaches, team working, job satisfaction

Appendix 3

Note for Reviewers

Supporting your staff

1. The benefits of regular and constructive reviews are well known. People feel more positive and motivated about their work if the review process is carried out well and on time. We all perform to the best of our ability when we:
 - Know what is expected of us
 - Know that we are valued
 - Are challenged and supported
 - Know where we are going
 - Receive regular feedback on our progress.
2. A constructive review process helps individuals to be clear about their role and helps them to be more effective. These actions improve personal morale and motivation and organisational effectiveness.
3. As a manager, you are responsible for helping your staff to perform effectively, and you have a duty to support their development and training to meet agreed objectives and job performance. These notes have been produced to help you in your role and to help the review discussion to be an enjoyable and constructive experience for both you and your staff members.

A two-way process

4. The review discussion should be two-way with feedback given and received by both the manager and the individual. People often feel uncomfortable about giving feedback to their managers and you will therefore need to create an atmosphere in which your staff are encouraged to talk about things that you do which may help or hinder their performance at work.
5. Try to anticipate the issues that may be raised so that you can respond in a positive rather than a defensive way. For example:
 - How can you create an environment where feedback can be given and received in a constructive way?
 - What might you expect your staff to say and how could you respond?
 - What action could you take as a result of the feedback you receive?
6. Some specific questions that you can ask at the appraisal review discussion to encourage feedback are suggested below:
 - In what way can I support you in the achievement of your objectives?

- Are there things that I do that you find particularly helpful in our working relationship?
- Are there things that I do which are not helpful – what would be more helpful?
- Is there anything that I do not do that you would like me to start doing?
- Is there any information that I can provide for you that will enable you to do your job more effectively?

7. When giving feedback you should:

- Start with positive feedback
- Have specific examples to demonstrate what you have to say – what did the individual do or say that led to a successful or unsuccessful outcome?
- Concentrate on what can be changed – for example, performance rather than personality
- Avoid being judgemental – this can lead to confrontation rather than learning
- Listen carefully to what is said in response to your feedback – check that it has been understood and be prepared to adapt your view if appropriate
- Address *what* has been achieved (i.e. the outputs) as well as *how* it has been achieved.

Reviewing the past

9. You should have had meetings throughout the year to discuss the individual's progress and performance. These meetings, sometimes called 'one-to-ones' or 'supervision', usually concentrate on the job itself and how objectives are progressing. This review concentrates on both the job and, more particularly, the individual themselves. The review is your opportunity to provide your staff with feedback in a consolidated and structured way, taking account of events that have happened since the last meeting. Review meetings must take place at least once every twelve months, with at least one interim 'mini-review' taking place during the same period, normally six months ahead.
10. When preparing for a review meeting, start by recalling their objectives and what the individual has done during the review period. For example, consider what work they have concentrated on, and what new work or tasks they have carried out.
11. Consider the following questions:
- What significant events have occurred during the review period that will have had an influence on the individual?
 - What impact did these events have on the job and how did s/he cope with them?
 - What did s/he appear to have difficulties with and why? What evidence have I got to support this view? What feedback do I think is appropriate and does this point to any particular development need?

- Do I have any general concerns about performance? Have I got clear examples? How should these be addressed? Have I already started discussions about performance and where do these fit into the review?
- What objectives did we agree for the last period? Were these achieved? If not, what prevented them from being achieved, and was my support sufficient?

Looking to the future

12. It is your responsibility as a manager to ensure that your staff understand how they are contributing to the business plan. You should also ensure that they have the opportunity to contribute their own ideas about future work priorities and making improvements. In planning for the review meeting you should focus on corporate objectives, and be clear about how you expect your staff to help ensure that these objectives are met.

13. You will need to consider the following:

- What changes or developments am I aware of that will influence work over the coming year? Will this have an impact on the individual's job? What impact will it have on the skills and competencies required for the post?
- What does the team need to achieve over the coming year and what objectives will this translate into?
- What do I need her/him to achieve – how does it relate to my own objectives?
- Have I shared my own objectives with my staff?
- If there are no significant changes anticipated, what can I do to ensure s/he continues to perform well and remains motivated?

Agreeing new objectives

14. This essential part of the review process may take place at a separate time to better relate to the Town Council's calendar. Objectives should be considered and discussed between you and not simply imposed. Objectives should be linked to the business plan, and should include a balance of measurable shorter-term goals and longer-term developmental targets. You will have a broader view of the Town Council's corporate and team objectives and you will therefore be able to help your staff to identify goals.

15. In agreeing new objectives, remember not to focus just on individual or task related activities, but consider also team objectives, and those for personal development and for maintaining good performance. Where longer-term objectives span more than one review period, it is a good idea to agree interim 'milestones'.

16. Wherever possible, objectives should be prepared using the SMART approach, i.e. they should be:

- **S**pecific
- **M**easurable
- **A**chievable
- **R**elevant
- **T**ime related

17. Where jobs cover ongoing or routine work, it can be more difficult to think of objectives that will be challenging. Remember however that your staff should have a detailed understanding of their day-to-day work, and they may have ideas about improving service delivery. You should therefore give them an opportunity to be innovative, and suggest improvements to the way in which they work. Individuals should also be encouraged to suggest how team performance could be improved.

Agreeing personal development

18. Agreeing personal development is a joint activity, and you should encourage your staff to identify their own development needs. The outcome needs to be a shared development plan with agreed outcomes, which are achievable and realistic.

19. Use these questions to help you think about the key areas for development:

- What needs have I identified? Why are these important?
- What will s/he have identified? Are we likely to be in agreement?
- What ideas do I have to help him/her develop in these areas? Will anyone else need to be involved?
- Will s/he need any particular support from me or others to ensure that development objectives are achieved? How can I provide this support?
- What is the priority for these objectives to be met?

Any other issues

20. This is an opportunity for you and your staff member to discuss any other issues affecting their job, for example your management style and approach, any team working issues, their job satisfaction. This provides an opportunity to discuss possible ways of alleviating any stressful situation and identifying sources of help and advice.

Confirming your discussions

21. Following the review discussion, you should complete the Main Record of Discussion form, sign it yourself and ask the individual to agree and sign the form as an accurate and true record of the discussion. This must be done within two weeks of the discussion. The form should then be passed to the Town Clerk for monitoring purposes, who will then arrange for the form to be placed on the individual's personal file.

CROWBOROUGH TOWN COUNCIL

MAIN RECORD OF DISCUSSION/PERSONAL DEVELOPMENT PLAN

Employee.....

.....

Job

title.....

.....

Period of review - I..... to

Date of review

meeting.....

Name of line manager.....

PART ONE: Reviewing last year

Objectives set last year	Achievements/comments
1. 2. 3. 4. 5. 6.	

Any other issues relating to the year:

PART TWO: Looking forward

List agreed objectives (6-8 maximum) for the coming year. Include success criteria indicators (i.e. how will you know you have been successful).

Objective	Success criteria	Time scale

General job performance	Success criteria	Time scale
Planning and prioritising workload		
Communicating appropriately		
Working collaboratively with others		
Flexibility and adaptability		

PART THREE: Personal development

Name..... Period covered.....

Personal development planning helps to define and explore objectives and development needs and map out ways to turn them into reality.

Development Area / Work objective (what skills/knowledge do I need to acquire?)	Development activity (how will I do this? Courses are only one option)	Actions: (When will I do it? Who will arrange it?)	Expected outcome (How will I know I have achieved this?)

The above personal development plan has been discussed and agreed

Signed.....
(Line Manager)

Date

Signed:
(Employee)

Date

PART FOUR: Other issues and any concluding comments

Is the job description still a true reflection of the current role? Y N
Comments:

MINI-REVIEW

DATE SET FOR MINI REVIEW:

PART FIVE:

This is a true and accurate record of my review discussion

Employee's signature.....

Date.....

This is a true and accurate record of the review discussion

Line manager's

This is a true and accurate record of my review discussion

Employee's signature.....

Date.....

This is a true and accurate record of the review discussion

Line manager's

signature:.....Date.....
I have read and reviewed this record of the appraisal review discussion
Town Clerk's signature:
Date.....