

Ferndown Town Council Performance Management Policy

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1. Introduction

1.1 Ferndown Town Council (Council) recognises its success and the services it delivers depends on the effectiveness of its employees. Council's employees are its most important resource, and to be effective, they need to be clear, on their roles, responsibilities and objectives. Managing employee's performance is a continuous process that involves making sure that the performance of employees contributes to the aims and objectives of Council to achieve high levels of organisational performance.

Councillors also have a role in the performance management process and are encouraged to undertake regular training to keep up to date with best practice.

1.2 Good performance management helps everyone to know:

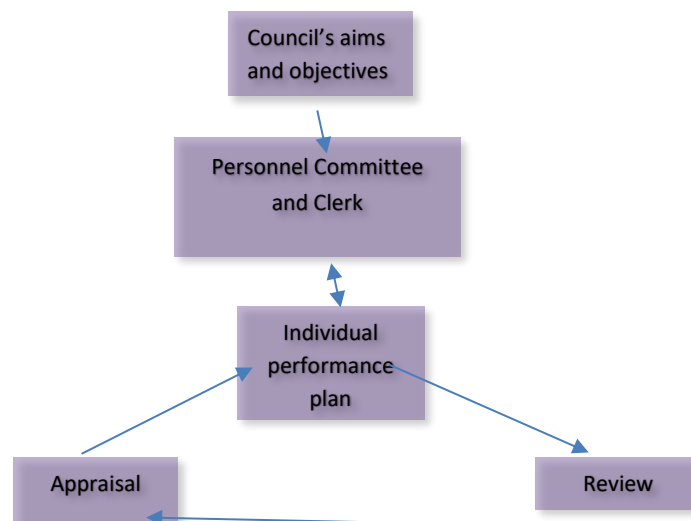
- what Council is trying to achieve,
- their role in helping Council achieve its goals,
- the skills and competencies they need to fulfil their role,
- the standards of performance required,
- how they can develop their performance and contribute to the development of Council,
- how they are doing, and
- whether there are performance problems and what to do about them.

1.3 The Clerk is responsible for maintaining a record of training courses undertaken by councillors and employees.

2. Scope

2.1 This Policy applies to all Council employees and councillors. It is the responsibility of all employees and councillors to familiarise themselves with this policy.

2.2 An Overview of Council's Performance Management Policy:



3. Roles and responsibilities

3.1 Performance management is the responsibility of everyone within Council. It requires an inclusive process to ensure that employees:

- know and understand what is expected of them,
- have the skills and ability to deliver on these expectations,
- are supported by Council in developing the capacity and capability to meet these expectations,
- are given feedback on their performance and
- can discuss and contribute to their and Council's aims and objectives.

3.2 The Personnel Committee is responsible for maintaining and reviewing this policy (in line with changes in legislation) and managing the Town Clerk (see 4.3 below).

3.3 The Town Clerk is responsible for managing all Council employees and ensuring that the overall process and implementation of this process is carried out. Specifically, this includes:

- agreeing objectives, competencies and development needs with the individual employees so they can contribute to Council's goals,
- review individual performance against objectives and competencies throughout the year,
- give feedback and discuss amendments to individual objectives as circumstances change,
- agree the skills and behaviours necessary to do the job well and agree a personal development plan,
- help staff achieve objectives through support and training or other development opportunities,
- manage under performance, and
- hold an annual appraisal review with employees and, in collaboration with the employee, write an appraisal report, supplemented with an interim six-month review and ad hoc review meetings.

3.4 The success of this performance management system rests largely with the Town Clerk. As the person who works closely with employees, the Town Clerk should link Council's aims and objectives with the employee's performance by putting them in the context of the employee's work.

3.5 When employees do not meet expectation the Town Clerk will need to invoke other Council procedures (e.g. Capability or Disciplinary Procedures).

4. Agreeing individual objectives

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

4.2 Objectives should be in line with Council's objectives (see appendix 1) and SMART:

- a. Specific – objectives should state the desired outcomes to be achieved by the employee:

- b. Measurable – objectives should detail how the Town Clerk and employee will know they have been achieved.
- c. Achievable – the objective should be something the employee is capable of achieving and challenging.
- d. Relevant - objectives that relate to the those of Council.
- e. Timebound – a date when the objectives need to be achieved by.

5. Agreeing competencies/behaviours

- 5.1 Council uses a competency-based process to support the development of its employees.
- 5.2 Competencies are the behaviour that employees need to perform a job to a high level and are outlined in job descriptions and person specifications.
- 5.3 The Town Clerk will agree appropriate competencies with each employee which will then be assessed against behaviours as demonstrated when doing their job.
- 5.4 The Personnel Committee set the Town Clerk's competencies.

6. Councils aims and objectives

- 6.1 The Council's corporate aims and objectives provide a strategic framework for this policy (see appendix 1).
- 6.2 The Town Clerk is responsible for interpreting these for Council employees by setting appropriate objectives during appraisals and review meetings. It is the employee's responsibility to deliver on those objectives with appropriate support from the Town Clerk.

7. Person specifications and job descriptions

- 7.1 Job descriptions and person specifications should be reviewed with the post holder prior to meetings. Changes to a role can occur at any time throughout the year, and changes should not wait until the meeting to be discussed.
- 7.2 Job descriptions and person specifications will be reviewed by the Town Clerk and the employee on an annual basis to identify any changes that may have occurred within the role. The Town Clerk's job descriptions and person specifications will be reviewed by the Personnel Committee.
- 7.3 If required, Council and employees should seek advice and guidance from its external HR contractor, County Association (DAPTC) and SLCC.

8. Training

- 8.1 The Personnel Committee members and Town Clerk must have relevant training to run and administer this process.
- 8.2 Personnel Committee members and employees are expected to refer to and use this policy to undertake relevant processes referred to (e.g. appraisals, reviews, development and training).
- 8.3 This policy document is available on the Council website and in the Employee Handbook.

9. New employees

9.1 New employees will be set objectives as part of their induction.

9.2 Probation periods differ for new employees and usually cover up to the initial six months of employment.

9.3 New employees will have 3- and 6-month reviews as part of their probation period.

9.4 Where probation is successful, the employee and Town Clerk will undertake regular appraisals and review meetings in line with this policy. This is in order to ensure that the employee knows what is expected of them, their performance is monitored, support is provided, and objectives are reviewed and amended where needed.

10. One-to-one meetings

10.1 The Town Clerk (Chairman of the Personnel Committee in relation to the Town Clerk) should hold one-to-one meetings with all employees on a regular basis. It is recommended that meetings are held every two to three months.

10.2 Outcomes of one-to-one meetings should be recorded by the Town Clerk/Committee.

11. Development plans

11.1 To meet short and long-term objectives employee's development needs should be set out in a development plan and include:

- the development needed,
- how the development will be achieved,
- when the development will be achieved and
- how the achievement will be measured.

11.2 Council will provide development opportunities in the form of training courses, further education, continued professional development, mentoring, coaching and support for special/unique projects.

11.3 Development plans will be reviewed annually as part of the appraisal process.

12. The appraisal process

12.1 Appraisals (see appendix 2) are a positive and continuous process, performed in an annual cycle, consisting of:

- regular informal meetings where the Town Clerk (Personnel Committee for the Town Clerk's appraisal) will discuss current work and development, recognise achievements with feedback, encourage progress and identify any problems,
- formal half yearly interim reviews where progress is assessed against performance plans,
- achievements are recognised with feedback, progress is encouraged, and problems identified,
- annual appraisal review where the work for the year is discussed, feedback given, and a formal rating of performance recorded.

12.2 Appraisals are also a good opportunity to discuss training requirements.

13. Training and development

13.1 The Town Clerk is responsible for recording employees and councillors' training and development (including refusal).

13.2 Council is committed to the training and development of all its employees and councillors to ensure the consistent delivery of quality services to its residents.

Council will set aside an annual budget for training purposes and take advantage of any partnership training available (e.g. via DAPTC).

Any request for training or learning and development must be in line with Council's aims and objectives and individual requirements. Once undertaken, an evaluation of the effectiveness of the training will be undertaken by the individual and fed back to the Town Clerk and Personnel Committee.

Employees will be asked to identify their development and training needs with advice from the Town Clerk during their reviews, appraisals or one-to-one meetings. Mandatory training as directed by the Town Clerk is compulsory (e.g. health and safety) and necessary to ensure that employees are aware of their legal responsibilities.

13.3 See Council's separate Training and Development Policy.

14. Succession planning

14.1 The appraisal and one-to-one meetings present an opportunity for employees who are nearing the age where they may take their retirement pension to discuss plans for retirement or preretirement changes to work patterns (e.g. flexible retirement or part-time working). Furthermore, they form part of business continuity planning processes.

14.2 It is up to the individual employee to raise this at the appropriate time to ensure that Council can continue to deliver the service without undue disruption due to retirement.

14.3 Employees should not be compelled to discuss career/retirement aspirations if they choose not to, all information must be offered voluntarily. Any discussion that does take place should be of a supportive nature and implications for both Council and the individual should be considered.

14.4 Council must ensure it pays due regard to the provisions of the Equality Act 2010 in relation to career management, succession planning and training and development. Reasonable adjustments may need to be considered for those with specific requirements arising from a particular protected characteristic.

15. Policy monitoring

15.1 The Council will review and monitor the application of this policy annually or earlier if legislations requirements change.

15.2 Responsibility for the implementation, monitoring and development of this policy lies with the Personnel Committee and Town Clerk.

15.3 Day to day operation of the policy is the responsibility of the Town Clerk who will ensure that this policy is adhered to.

Appendix 1 – Ferndown Town Council's Mission Statement, aims and objectives

Ferndown Town Council will work with other agencies to provide a safe, high quality environment to meet the needs of residents and visitors and defend the best interests of the Town for the benefit of everyone.

Aims and objectives

To enable residents of Ferndown and its surroundings to enjoy high quality social, recreational and cultural facilities within the Town and seek the continuing improvement and development of these facilities in accordance with the wishes of residents.

- To encourage and promote the economic and commercial vitality of Ferndown.
- To preserve the unique identity of Ferndown and promote its heritage.
- To ensure the harmony exists between commercial, ecological and residential requirements.
- To consult with and take due regard of all comments received from other statutory bodies, voluntary organisations and individuals, to ensure an improving standard of service to meet local needs.
- To represent the views and wishes of the people of Ferndown.
- To provide a democratic, representational voice for the Ferndown community.
- To help create a socially inclusive and caring community, which embraces all residents, irrespective of their circumstances.

Appendix 2 - Sample Appraisal form

Part 1 Summary detail

Employee's name	
Job title	
Manager's name	
Date of meeting	
Annual or 6-month review	

Part 2 Performance review

Review of previous objectives and competencies agreed:
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Development and training (list any specific requirements that will enhance skills, knowledge and behaviour required in employees work of to develop him/her further):

Career planning Record any areas the employee has expressed a specific interest:
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Other areas of discussion raised at the meeting:
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Objectives and competencies this year:
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Part 3 Assessment level (based on performance over the year against objectives achieved)

Outstanding performance (objectives exceeded and competencies more than fully demonstrated)	
Good performance (majority of objectives exceeded and competencies fully demonstrated)	
Standard performance (objectives met and competencies fully demonstrated at required level)	
Less than standard performance (most objectives met but development required to fully meet all objectives)	
Unsatisfactory performance (performance unacceptable; objectives not met, and competencies not demonstrated)	
Employee's signature	
Appraiser's signature	
Date:	
One copy of this completed form will be kept by the appraiser, one by the appraisee and one the employees' personnel file.	