



To: All members of the Personnel Panel,

A meeting of the Personnel Panel will be held in the Council Chamber, Town Hall, Lewes, on 4 October, 2022, at 10:00am, which you are summoned to attend.

Laura Chrysostomou
Town Clerk
28 September 2022

Agenda

1 Filming of council meetings and mobile phones

During this meeting, the public are allowed to film the committee and officers only from the front of the public gallery, providing it does not disrupt the meeting. Any items in the exempt part of an agenda cannot be filmed. If another member of the public objects to being recorded, the person(s) filming must stop doing so until that member of the public has finished speaking. Please switch mobile devices to silent for the duration of the meeting

2 Election of Chair

To elect a chair for the municipal year 2022 to 2023

3 Apologies for absence

4 Members' declarations of interests

To note any declarations of personal or prejudicial interest in items to be considered at this meeting.

5 Question time

Members of the public are welcome to attend this meeting of the Personnel Panel. Questions regarding items on the agenda may be heard at the start of the meeting with the Chair's consent. A period of 15 minutes is allocated for this purpose. Questions or requests to address the council must be submitted to the Town Clerk by noon the day before the meeting.

6 Chair's announcements and urgent items

7 Officers' reports

7.1 Appraisal and supervision scheme

To consider the appraisal and supervision templates attached pages 3 to 15

8 Exempt business

It is recommended that:

The public and accredited representatives of the press be excluded from the meeting under Section 100 Local Government Act 1972 due to the confidential nature of the business to be conducted.

This item is a confidential report for Members of the Council only in accordance with Paragraph 4 of Part 1 of Schedule 12A of the Local Government Act 1972, being information relating to any consultation or negotiations, or contemplated consultations or negotiations, in connection with any labour relations matter arising between the authority and employees of, or office holders under, the authority.

9 Officer's exempt report

- 9.1 To discuss staffing requirements in light of changes to staffing resulting from maternity leave and retirement.

Lewes Town Council

Annual Performance Appraisal Review

Appraisal Documentation

Mission Statement:

Lewes Town Council is committed to providing, maintaining and developing services and local initiatives which will improve the quality of life of the residents of Lewes in accordance with our vision

Principal Aims

- Lewes Town Council will manage its resources to a high standard providing valued community services
- Representing the interests of Lewes residents, the Council aims to be more open, transparent, efficient, effective and ethical.

Annual Performance Appraisal Review

Appraisal Documentation

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Council Performance Appraisal Standards

Performance Appraisal Standards

- You and your immediate line manager/supervisor should undertake a Performance Appraisal Review once a year and a mid-year review in between.
- You and your immediate line manager/supervisor should undertake monitoring meetings every 6/8 weeks.
- Teams should undertake appraisal training to ensure everyone is clear about the appraisal process and paperwork, their responsibilities and the line-managers responsibilities.

What is 'performance appraisal'?

It is a one-to-one discussion between you and your manager. It focuses on a review of your past work performance and development and it helps plan the year ahead. It is an opportunity to acknowledge work done well, explore how performance might be improved and where development might help. The appraisal meeting should take place annually. Progress towards the agreed objectives should be reviewed formally every 6/8 weeks during 'one to one supervision' sessions.

Why do we need a performance appraisal review?

We are all part of continually improving services and are accountable for how our individual contribution helps to meet customers' needs. The Town Council has identified its strategic policies and priorities, indicating its objectives for the coming years and how it plans to meet them. This target setting process cascades down to departments, teams and individual employees. This is known as the "golden thread".

The Performance Appraisal Review is a way for everyone to assess how they have individually contributed to the Town Council's service delivery over the past year. It also enables everyone to get a clear understanding of how they are expected to contribute to the achievement of future plans and what training and development support might be required.

Guidelines for Appraisal Paperwork

How to complete your document

- Complete the details sheet (page 6) with your details, those of your line manager and your senior line manager.
- Once you and your manager have agreed how to rate your overall achievement tick one box at the bottom of page 6 (please refer to guidance on page 13).
- Use page 7 and 8 to review your performance against the targets agreed from last year and reflect on any training and development undertaken and the impact it has had.
- Use page 9 to record your agreed targets for the coming year, when they need to be achieved by and any progress notes
- Use page 10 to record the learning and development activities you require for the coming year to assist you in achieving your targets

Step by Step (YOU and your Manager)

- 1 You and your line manager should both check that you have updated your copies of the Appraisal documentation from the previous year ready for your review meeting.
- 2 Have your meeting.
- 3 You should both (you and your appraiser) write up some notes about what you agreed during your meeting. (Perhaps you could write your targets out in your own words and check that your manager agrees with them). Use the appraisal documentation to record agreed targets, etc.
- 4 Share your notes with your manager and ask for a short summary from them to confirm that you both have the same expectations.
- 5 You should keep a copy of your Appraisal documentation and your manager should also retain a copy for their records. A copy should be given to the Assistant Town Clerk for placing on personnel files.
- 6 Use these copies to have discussions during your one-to-one meetings throughout the year.

Step by Step (Manager / Appraiser ONLY)

- 1 As a manager, you are targeted with undertaking an Annual Performance Appraisal Review with every member of your staff. Information from your team's Personal Development Plans (page 10) needs to be collated into a Team Training Plan for consideration by the Council
- 2 Your **Team Training Plan** then needs to be forwarded to the Town Clerk

Annual Performance Appraisal Review

Your Details			
Name			
Job title & Grade			
Team & Department			
Period reviewed	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; border-right: 1px dashed black; padding: 5px;">From:</td> <td style="padding: 5px;">To:</td> </tr> </table>	From:	To:
From:	To:		
Meeting Date			
Signed			

	Line Manager's Details	Senior Line Manager's Details
Name		
Job title		
Date		
Signed		

Overall Achievement against targets – Tick one box only (see page 13 for criteria)			
Exceeded	Achieved Well	Achieved	Not Achieved

Looking Back - Targets

To complete this section refer to Town Council objectives and your agreed individual targets from the previous year.

Individual Performance Target	Target Met? Yes/No/Partially	Evidence/example	Comments including factors affecting performance

Looking Back – Learning and Development

To complete this section refer to your agreed development activities agreed on your personal development plan from the previous year.

Learning and Development activity undertaken	How did you apply it in your job?	Evidence/example of improvement

Looking Forward - Targets

To complete this section refer to the Town Council objectives as outlined by your manager.
These targets will be used as the measure of your performance over the next 12 months.

Individual Performance Target (What is to be achieved)	Measure (How will you know the performance target has been achieved)	Time Scale (By when)	Progress You can use this column to regularly update current progress/changes to targets etc. and record any notes for future review meetings

Looking Forward – Personal Development Plan

Record the personal learning and development you require to support you in achieving your agreed performance targets and the level of competency required for your job.

Learning and Development activity (the development opportunities which would help you to achieve your performance targets)	Link to work plan/targets	Outcomes required (what will you do differently and how it will benefit you, your team and the Council)	Costs

Overall Performance – Summary Comments

This part of the Performance Appraisal Review allows both parties (appraiser and appraisee) to reflect on all aspects of the individual's performance over the last 12 months. The process encourages summary comments from both parties.

This part of the process can be used by the appraisee to comment on any additional aspects of their performance over the past year. The appraisee may also specify here what they would wish their line manager to do 'more of or less of', and any systems or processes that need to be reviewed to make their job more manageable.

Summary Comments from member of staff being appraised

This part of the process can be used by the appraiser to comments on any additional aspects of the appraisee's performance over the past year. The appraiser may wish to respond to the views expressed by the appraisee about what they would wish them to do 'more of or less of'.

Summary Comments from Line Manager

Moderation

The part of the process allows the appraisee to request a follow-up meeting with their Senior Line Manager if appropriate.

Would you like a follow-up meeting with your Senior Line Manager?

Yes

No

Summary Comments from Senior Line Manager

Achievement against individual performance targets and behaviours expected in your role

The criteria described in the chart below should be used by managers to assess the level of performance against individual performance targets, skills and behaviours. Evidence should be available to justify the outcome with the appraisee. Any amendment to targets due to policy changes or mutual agreement between managers and appraisee will be taken into account.

Excelled	Has regularly <u>exceeded</u> all levels of personal performance beyond the normal expectations of the role in a thoroughly proficient and professional manner.
Achieved Well	Has achieved a high level of personal performance expectations, demonstrating an ability to <u>meet all requirements</u> of the role.
Achieved	Has achieved the <u>majority of personal performance</u> expectations of the role. Further support to improve quality and consistency has been identified and is recorded in the appraisee's Personal Development Plan.
Not Achieved	Has <u>fallen below the personal performance expectations</u> of the role that could reasonably be expected. There is clear evidence for required improvement in a number of defined areas. For example, if you are a manager, failure to undertake appraisal reviews with every member of staff.

N.B: In the event that you are unable to provide an overall rating for your member of staff due to the length of time they have been employed by the Council, i.e. less than a year, please note this fact in the summary comments section.

1 to 1 Supervision / Review Record

Team member		
Manager		
Date of Meeting		
Progress Report	<u>Target/ Projects</u>	<u>Update/Achievements (since last 121)</u>
Budget Update		
Team/ team member update/issues		
Training requests/completed		
Health & Safety		
Leave and attendance		
Concerns	None	
Targets and activities for the next month	<u>Target/ Project</u>	<u>Objectives and Actions</u>
Summary		

Supervision Record Agreed by:
Officer

Manager

Date

Date