



WELLINGTON TOWN COUNCIL APPRAISAL PROCESS FOR STAFF

1. Purpose

1.1. The appraisal process is designed to:

- Review and evaluate employee performance.
- Identify achievements, strengths, and development needs.
- Set clear and measurable objectives for the future.
- Promote two-way feedback between employee and line manager.
- Ensure alignment with the Council's strategic goals and values.

2. Scope

2.1. This process applies to all permanent and fixed-term staff employed by the Town Council, including administrative, grounds maintenance, and other service delivery roles. The goal of the appraisal process is to enhance staff performance while also contributing to the success of Wellington Town Council. The appraisal process will do this by:

- Having an open two-way communication process between Town Council staff and management to discuss and agree job performance and development needs.
- Reviewing and evaluating WTC staff performance against agreed objectives.
- Setting objectives for the year ahead in line with job descriptions and the Council's Strategic Plan.

3. Appraisal Cycle and Process

3.1. Annual Appraisal

- Conducted once a year, typically between **January and March**.
- Led by the employee's **line manager**. In the case of the Chief Executive/Town Clerk it will be led by the members of the Council's HR Sub Committee
- Covers the previous 12 months and sets objectives for the coming year.

The Annual Appraisal is an opportunity for WTC staff to discuss with their manager every aspect of their role. It's a two-way communication process and WTC staff opinions will be sought and valued on their performance, strengths and development needs.

To give an accurate and complete picture the conversation will include discussing not only successes but also any areas that require improvement.

One of the purposes of the Annual Appraisal is to discuss how any concerns can be overcome. This should include suggestions on how staff might be able to improve their performance.

At the end of the meeting, there will be an agreed set of objectives for the next period with accompanying timescales for completion. This will provide the framework for future progress and a benchmark against which performance can be reviewed.

3.2. Documents to be Reviewed

- Previous appraisal records.
- Job description and personal specification.
- Attendance and training records.
- Any relevant service delivery KPIs.

3.3. Employee Self-Assessment

Employees and managers should complete a **Self-Assessment Form** (see Appendix A) before the meeting, covering:

- Key achievements.
- Challenges faced.
- Training undertaken.
- Suggestions for improvement

The form should be used to make notes in advance of an Annual Appraisal ready for discussion with line managers. The questions serve as prompts and do not specifically need to be answered.

3.4. Appraisal Meeting Structure

The meeting should:

- Last 45–60 minutes in a confidential setting.
- Aim to complete the Annual Appraisal Review Form (See Appendix 2)
- Follow a structured format:

Section	Description
Introduction	Review purpose and agenda.
Review of Past Objectives	Discuss achievements and any unmet targets.
Job Performance	Assess against key competencies (e.g., communication, teamwork, service delivery).
Development Needs	Identify skills gaps and training opportunities.
Future Objectives	Set SMART objectives aligned with council goals.
Employee Feedback	Allow time for employee views, suggestions, or concerns.
Summary & Sign-Off	Agree on next steps and confirm mutual understanding.

3.5. Regular Review

Throughout the year, line managers may refer to and monitor the annual appraisal as part of ongoing management meetings. Focus will be on progress towards objectives and addressing any challenges.

4. Roles and Responsibilities

4.1. Line Managers

- Prepare for and conduct appraisals.
- Provide honest, constructive feedback.
- Support employee development and training needs.

4.2. Employees

- Reflect on performance and provide self-assessment.
- Engage in open discussion.
- Commit to agreed objectives and development plans.

4.3. Chief Executive/Town Clerk

- Ensure the process is implemented consistently.
- Monitor outcomes and address concerns.
- Provide training on appraisal techniques if required.

5. Documentation

5.1. The following form must be completed:

- Annual Appraisal Review Form

Both manager and employee must sign the final documents. A copy is retained by the employee, and one kept securely by the Town Clerk.

6. Confidentiality

6.1. All appraisal records are confidential and must be handled in accordance with **GDPR** and the Council's **Data Protection Policy**.

7. Monitoring and Review

7.1. The Town Clerk will annually review the process to ensure effectiveness.

7.2. Trends in training needs or performance issues may inform council workforce planning.

8. Appeals Process

8.1. If an employee disagrees with their appraisal outcome:

- a) They may raise the matter with the Town Clerk in writing within 10 working days.
- b) A review meeting will be arranged with an impartial senior officer or councillor.
- c) A final decision will be provided within 15 working days of the appeal meeting.

9. Policy Review

9.1. This policy was adopted in October 2025 and will be reviewed every three years.

Appendix A

PRE-REVIEW FORM

Employee Name	
Employee Job Title	
Line Manager	
Date of Meeting	

PAST PERFORMANCE	
Summarise how you have fulfilled your core duties.	
What were your most significant contributions?	
What challenges have you faced and how have you addressed them?	

DEVELOPMENT NEEDS	
Identify specific skills or areas you want to develop	
Is there any training or coaching you would like to have?	
What would you like to achieve in the next 12 months?	
Do you feel your Job Description correctly reflects your role?	
Other	

ANNUAL APPRAISAL REVIEW FORM

Employee Name	
Employee Job Title	
Line Manager	
Date of Meeting	

Past Performance Achievements, successes, strengths, objectives met, difficulties etc:	
Development Needs Both work and personal needs, training, coaching, mentoring, guidance etc:	
Job Performance Understanding of JD, requirements of role, any amendments needed etc:	
Future Objectives Increase in knowledge, more responsibility, new tasks, objectives etc:	

Employee Comments	
Line Manager's Overall Summary	

Employee Signature	
Line Manager Signature	
Date	

Chief Executive's Comments	
CEO Signature	
Date	