

Blisworth Parish Council

Performance Management Appraisal and Development plan

Background

Blisworth Parish Council is responsible for ensuring that the Parish Clerk is given the required guidance, resource and support, to ensure that they are able to operate as effectively as possible.

How is this achieved?

- 1 - Agreeing and documenting what is expected of the clerk. This is, primarily, based upon the Parish Clerk job description, and is detailed in the Performance Agreement.
- 2 – Regular monitoring of performance against the objectives outlined in the Performance Agreement.
- 3 – Identification of any training/development needs and the preparation/maintenance of a personal development plan.

When does this take place?

- 1 - An Annual performance review will take place every year, normally in January. An updated Performance Agreement and Personal Development Plan will also be agreed at this time.
- 2 - An interim review will take place six months after the annual review, normally in July.
- 3 - Regular updates will take place throughout the year, normally monthly.
- 4 – The Personal Development Plan forms part of the review and follows the same timetable.

Who carries out the Reviews?

The review will normally be carried out by the Chairman with the assistance of the Vice Chairman, with input from other members of the Council (using Performance review Form 2)

The review will be carried out by one or more member(s) of the HR Committee, with input from other members of the Council (using Performance Review Form 2).

What happens before for the Review?

- 1 – Approximately one month before the Review, Performance Review Form 1 (see below) will be sent to the Clerk for completion and return 2 weeks before the Review.
- 2 – Approximately one month before the Review, Performance Review Form 2 (see below) will be sent to all Councillors for completion and return 2 weeks before the Review.

What happens during the Review?

A discussion takes place regarding

- 1 – Performance during the last 6/12 months performance including what has gone well or not gone well.
- 2 – Specific Development/Training needs, and any other support or help required.
- 3 – Any potential changes to the Performance Agreement for the next Review period.

What happens after the appraisal?

The following documents are completed and sent to the Clerk for approval/agreement

- 1 – Annual (or interim) Appraisal form.
- 2 – Personal Development/Training Plan.
- 3 – Updated Performance Agreement.

What happens if there is a disagreement?

- 1 – A discussion will take place between the Clerk, Chair and vice-chair to see whether any issues can be easily resolved.
- 2 – If it is not possible to resolve remaining issues, the matter should be dealt with in accordance with the Grievance and Disciplinary Policy.

Documentation

1. Performance Review Form 1 (to be completed by Clerk)

Based upon your Performance Agreement -

1.1. What do you feel have been your major achievements in the past year (or 6 months)?

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 (or six) months?

1.4. Identify what you see as your specific training and/or development needs to enable you to achieve these objectives and further your personal development:

1.5 Describe any other help and/or support you feel that you need to achieve these objectives

2. Performance Review Form 2 (to be completed by Councillors)

Based upon the Clerks Performance Agreement -

2.1. What do you feel have been his/her major achievements in the past year?

2.2. Which parts of the job/objectives have not gone so well?

2.3. How would you describe the Clerks overall performance in the past twelve months?

2.4. Is there anything that you would particularly want to see from the clerk in the next 6/12 months?

3. Appraisal Form

3.1 Major achievements during the previous period (6/12 months)

3.2 What has not gone well and what improvements and/or support is required

3.3 Summary of overall performance

PARISH CLERK AND RFO JOB DESCRIPTION

1. Overall Responsibilities

1.1 The Clerk to the Council will be the Proper Officer of the Council and as such is under a statutory duty to carry out all the functions, and in particular to serve or issue all the notifications required by law of a local authority's Proper Officer.

1.2 The Clerk will be totally responsible for ensuring that the instructions of the Council in connection with its function as a Local Authority are carried out.

1.3 The Clerk is expected to advise the Council on, and assist in the formation of, overall policies to be followed in respect of the Authority's activities and in particular to produce all the information required for making effective decisions and to implement constructively all decisions.

1.4 The person appointed will be accountable to the Council for the effective management of all its resources and will report to them as and when required.

1.5 The Clerk will be the Responsible Financial Officer (RFO) and responsible for all financial records of the Council and the careful administration of its finances.

2. Specific Responsibilities

2.1 To ensure that statutory and other provisions governing or affecting the running of the Council are observed.

2.2 To monitor and balance the Council's accounts and prepare records for audit purposes and VAT.

2.3 To ensure that the Council's obligations for Risk Assessment are properly met.

2.4 To prepare and issue, in consultation with appropriate members, notices and agendas for meetings of the Council and Committees. To attend such meetings and prepare minutes for approval.

2.5 To attend all meetings of the Council, including any committees and sub-committees.

2.6 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.

2.7 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.

2.8 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.

2.9 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.

2.10 To manage and supervise any projects initiated by the Council and any associated staff as necessary.

2.11 To monitor the implemented policies of the Council to ensure they are achieving the desired result and where appropriate suggest modifications.

2.12 To act as the representative of the Council as required.

2.13 To issue notices and prepare agendas and minutes for the Annual 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.

2.14 To prepare, in consultation with the Chairman, press releases about the activities of, or decisions of, the Council.

2.15 To attend training courses or seminars on the work and role of the Clerk as required by the Council.

2.16 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.

2.17 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.

2.18 To attend the Conference of Society of Local Council Clerks, and other relevant bodies, as a representative of the Council as required.

Version	Details of any revision	Approved at	Date	Review Date
v1	Initial draft	07/06/2022	07/06/2022	May 2022
v2	None	Readopted at BPC Meeting 06/06/2022 Minute Point:22 (b)	06/06/2022	May 2023
V3	Change of wording from: The review will normally be carried out by the Chairman with the assistance of the Vice Chairman, with input from other members of the Council (using Performance review Form 2), To: The review will be carried out by one or more member(s) of the HR	Agreed BPC Meeting 04/07/2022 Minute Point: 19	04/07/2022	May 2023

	Committee, with input from other members of the Council (using Performance Review Form 2).			
Readopted	None	Readopted at BPC Meeting 02/05/2023 Minute Point: 31	02/05/2023	May 2024