



Parish Clerk

Performance Management Process

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Introduction

The Council's Performance Management Scheme is designed to promote development by reviewing past performance and looking ahead to set achievable objectives.

The aims of the Scheme are:

- To enhance the quality-of-service delivery by the Parish Council through encouraging the clerk to achieve high standards of performance.
- To help the clerk develop to their fullest attainable level of potential and achieve job satisfaction.

The main purposes of the scheme are as follows:

a) Performance:

To provide a clear statement on how the clerk is performing, to see whether further progress can be made, and consider what help might be given to build on strengths.

b) Responsibilities:

To record present and future responsibilities.

c) Personal development:

To look at future work and identify opportunities for development and training, to benefit the employee and to maximize the contribution to the Parish Council.

d) Communication:

To ensure that ideas and views are shared.

e) Future work:

To plan work priorities and objectives for the next year and consider solutions to problems.

Appraisal interviews are used help employees achieve and fulfil their potential and for the employer to monitor performance in order to achieve its goals and improve the quality of the services which it provides.

An appraisal interview is an opportunity to take an overall look at work content and volume, look back at what has been achieved, agree objectives for the future and consider what development needs the employee may have for the year ahead.

To the Appraisee (the Parish Clerk)

Please complete Section 1 in as frank and honest a way as possible giving as much detail as you can. This will enable the Council to better identify and address any problems and issues that have arisen. If possible, please type the completed section and send an electric copy to the Chairman.

When completing this bear in mind that your role as Parish Clerk and Responsible Finance Officer is complex and multiplex. Refer to your current job description, giving due emphasis to the spread of roles that you must perform and the weighting of each. In particular consider your delivery in terms of the targets for your specific responsibilities and related tasks as currently agreed.

You will also need to review the objectives set at the last review, whether they have been achieved or not and importantly any factors that assisted in completing them, or problems and

issues that have arisen in respect of fulfilling them. This will help the Council develop/maintain best practice in supporting you and delivering its services.

You should have a copy of the agreed programme leading up to and following the appraisal interview date recorded above. Please ensure that section 1 of the form is returned to the Chairman two weeks before this date in order that the [Chairman and Vice Chairman] *[or Parish Council Staffing Group]* have adequate time to review this and consider the completion of section 2.

At the appraisal interview you will jointly agree with the [Chairman and Vice Chairman] *[or Parish Council Staffing Group]* proposed new work objectives, along with a training and development plan to help you achieve these and continue to maintain or develop necessary skills. Together you will review your job description, responsibilities, tasks and targets, with any proposed changes also recorded. These and any additional points arising from the discussion during the appraisal interview will be recorded in Section 2. You will have a final opportunity to comment on the appraisal, objectives and training plan in Section 3 before these are presented to Council for formal approval.

To the Appraisers (*Chairman and Vice Chair*)

Consider what the employee has written in Section 1 and make your comments, taking into consideration the councillor survey returns, in Section 2 for discussion at the appraisal interview. Concentrate on where there is a need for high challenge or high support in what the Parish Clerk has said. When you have completed the appraisal interview and agreed objectives and the training and development plan, this should be written up and circulated to the Parish Clerk within a period of 2 working weeks.

APPRAISAL FORM

SECTION 1 (to be completed by Clerk)

1. Performance and Job Review

Use your job description and previously agreed objectives to complete this part of the form. Please review your job description, responsibilities, tasks and targets to ensure their continued relevance.

1.1. What do you feel have been your major achievements in the past year?

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 months?

1.4. State any part of your currently approved job description, responsibilities and tasks that you are not doing.

1.5. State any areas of work that you do which are not in your currently approved job description, responsibilities and tasks.

2. Objective Setting

- 2.1. Use your responses in part 1 and the Council's aims and objectives to consider what you intend to achieve next year.

Proposed Objectives:

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

- 2.3. Describe any particular help and/or support you feel that you need to achieve 2.1 and 2.2:

- 2.4. Describe ways in which you believe the Council's services and delivery could be improved:

- 2.5 Any Other Comments:

Date completed by Parish Clerk:

Date received by Chairman:

APPRAISAL FORM

SECTION 2 (to be completed by *Parish Council Staffing Group*)

3. Comments

To be completed in response to Section 1 and with the assistance of the results of the Councillors survey as part of the appraisal interview.

3.1 Comment on identified main achievements (Add anything else that was done particularly well)

3.2 Comment on work or anything else which could be improved:

3.3. Comment on any tasks that should no longer be in the job description and any that should be included:

3.4 Give your overall assessment of the post holder's performance during the last twelve months incorporating the results of the Councillors survey (include strengths, weaknesses, and any constraints to their work and the outcome of specific agreed objectives).

4 Agreed Objectives and Training and Development Plan

To be completed and agreed as part of the appraisal interview.

There should be no set number of objectives, but they should be reasonable and attainable and address the main issues raised in section 1 and by the Councillors survey. They should also be demanding enough to stretch the Parish Clerk; have direct relevance to the Council's aims and objectives or service delivery; include any training, or personal development needed and where possible establish targets for completion. Any objective(s) that have been carried forward from the last appraisal should be noted.

4.1 Objectives:

Target for completion

4.2 Training and Development Plan:

APPRAISAL FORM

SECTION 3 APPRAISAL FORM - Sign off

This section provides for the Parish Clerk to comment on the completed section 2 and the appraisal process and the opportunity to raise any issues or concerns that they feel remain outstanding.

COMMENTS

(please include any ideas for improving the appraisal process)

[Chairman and Vice Chairman or Parish Council Staffing Group] response to comments in Section 3 above with any proposed actions

Signing Off

To be completed when Objectives and Training Plan approved by Council.

Signature of:

Chairman

Date

Vice Chairman/Other Councillor Present Date:

Date:

Signature of Parish Clerk:

Date:

APPRAISAL FORM

Section 4 - Parish Clerk/RFO - Councillor Survey Form for 12-month period to January 20__

To be completed by all Councillors and returned to the Chairman before or at January Parish Council meeting.

The following appraisal should be read in conjunction with the job descriptions for the role as shown.

PROPER OFFICER OF THE COUNCIL / THE CLERK TO THE COUNCIL	Unsatisfactory	Satisfactory	Good	Excellent
1 To ensure that statutory and other provisions governing or affecting the running of the Council are observed.				
2 To monitor and balance the Council's accounts and prepare records for audit purposes and VAT.				
3 To ensure that the Council's obligations for risk assessment are properly met and managed.				
4 To prepare, in consultation with appropriate Members, agendas for meetings of the Council and Committees.				
5 To attend such meetings and prepare minutes for approval.				
6 To manage correspondence and documents on behalf of the Council including to issue instructions of, or the known policy of the Council.				
7 To receive and report on invoices to be paid for or issued by the Council and to ensure such accounts are met.				
8 To study reports and guidance on activities of the Council and discussing matters arising with specialists to produce reports for circulation.				
9 To use initiative and suggestions by Councillors proposals for consideration to advise on practicability and likely effects of specific courses of action.				
10 To monitor the implemented policies of the Council to ensure they are achieving the desired result and where appropriate suggest modifications.				

PROPER OFFICER OF THE COUNCIL / THE CLERK TO THE COUNCIL	Unsatisfactory	Satisfactory	Good	Excellent
11 To act as a representative of the Council as required.				
12 To issue notices and prepare agendas for the Parish Meeting and to implement the decisions made that are agreed by the Council.				
13 To prepare, in consultation with the Chairman, press releases about the activities of, or decisions of, the Council.				
14 To attend training courses or seminars on the work and role of the Parish Clerk as required by the Council.				
15 To hold or be working towards the status of Qualified Clerk as a minimum requirement for effectiveness in the position of Clerk to the Council.				
16 To ensure that the Assets of the Council are maintained to an appropriate standard and the Asset Register reflects this.				
17 To ensure that the play equipment in the Playing Field is monitored regularly for safety purposes.				
18 Maintain/add and coordinate content on Facebook, the Council website and liaise with the web management company, as necessary.				
19 To ensure that up to date information is displayed on the four noticeboards around the Parish.				
20 To ensure information that the Information Commissioner Office (ICO) is available, correctly published, accessible and up to date.				

General Comments *(including if you have any comments or ideas on how the Parish Clerk may improve their service to the Council or any specific projects or tasks you would like to see completed by the Parish Clerk over the next year)*

RESPONSIBLE FINANCE OFFICER	Unsatisfactory	Satisfactory	Good	Excellent
21 To prepare and present timely financial reports: budgeting, fund balances, receipts, payments and to submit the precept requirement.				
22 To bank properly, control payments and manage cashflow involving Members in the internal financial control systems wherever possible.				
23 To be responsible for the preparation and submission of statutory duties and payments for payroll, VAT, financial statements and annual returns including liaison with auditors in accordance with proper practices.				
24 To monitor compliance with the Council's financial regulations, manage the risk assessments and maintain the Council's Asset Register ensuring the Council has the documentation and information for operating lawfully.				
26 To research and bring forward opportunities to apply for grants to support Council aspirations.				

General Comments *(including if you have any comments or ideas on how the responsible finance officer may improve their service to the Council or any specific projects or tasks you would like to see completed by the responsible financial officer over the next year)*

Signature:	Name:	Date:
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Programme

Following the Annual Autumn finance meeting and before the January meeting the Parish Council Staffing Group meet with the clerk to discuss the appraisal process, timings, forms etc. with them to identify and resolve any concerns or queries about this + appraisal form Section 1 given to clerk at this meeting.

December Meeting – Councillor survey form Section 4 given to councillors.

January Meeting – Councillor survey forms to be returned to Chairman.

January – clerk to return completed Section 1 to Chairman

February –Parish Council Staffing Group to meet to produce summary of Councillor survey feedback.

February/March – Chairman and Vice Chairman to meet to consider clerk's Section 1 responses and make their comments in Section 2 for discussion at the appraisal interview.

March – Appraisal Date conducted by Chairman and Vice Chairman

3rd Thursday of March - appraisal outcome received by the Parish Council as part of Annual Staffing Meeting.

Training courses

ILCA (Introduction to Local Council Administration)

The Introduction to Local Council Administration (ILCA) is an online sector specific learning tool is designed to support all new council officers in England and Wales in their roles in the first few months of employment, as well as those aspiring to go on and complete their Level 3 CiLCA qualification.

The aim of the course is to provide an introduction to the work of a local council, the clerk and its councillors.

The online programme can be studied in your own time while you find your feet in your new role. The course is in five sections based on the Occupational Standards established by the National Training Strategy in England.

Requirement for the course is an interest in the work of local councils.

<https://www.slcc.co.uk/qualification/ilca/>

FILCA (Financial Introduction to Local Council Administration)

The Financial Introduction to Local Council Administration (FILCA) is an online sector specific learning tool to support all new Responsible Financial Officers (RFO's) in England and Wales (or officers who have a financial element to their job role).

The aim of the course is to provide an introduction to council finance.

<https://www.slcc.co.uk/qualification/filca/>

CiLCA (Certificate in Local Council Administration)

CiLCA is an entry level qualification which tests whether you have a broad knowledge of all the aspects of a clerk's work – roles and responsibilities, the law, procedures, finance planning and community involvement.

CiLCA is like an A-level; it's a Level 3 qualification tailored for the officers of local councils.

<https://www.slcc.co.uk/qualification/Cilca/>

Other courses delivered currently by Cornwall Association of Local Councils via zoom.

- Code of Conduct
- VAT for Unregistered Councils (VAT 126)
- Data Protection & GDPR for Clerks & Officers Part 1: Foundations & Theory
- Data Protection & GDPR for Clerks & Officers Part 2: Accountability & Lawfulness
- Data Protection & GDPR for Clerks & Officers Part 3: Rights & Information Security
- Communicating with Your Community Part 1:
- Creating a Communications Strategy
- Communicating with your Community Part 2: Implementing Effective Community Engagement and Building Sustainable Conversations
- How Councils Can More Effectively Engage with Young People
- Dealing with Local and Regional Media
- Freedom of Information for Clerks & Officers