



# Appraisal Policy & Procedure

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Next Review Date	As required
Reviewed By	Staffing Committee

# Appraisal Policy & Procedure

## Introduction

The successful operation of any Council depends primarily on using the full potential of its workforce. Newton Abbot Town Council prides itself on being a responsible and positive employer.

The Council is committed to the support and development of all staff (employees and volunteers) in order that they can perform and reach their full potential in the role that they have with the Council.

This policy is applied fairly and consistently in line with the [Equality Act 2010](#). Appraisal records are handled in accordance with the [UK GDPR and the Data Protection Act 2018](#). The policy aims to:

- recognise achievements and strengths.
- identify development needs and support.
- align individual objectives with Council priorities and service plans; and
- inform workforce planning, training and succession.

The appraisal process is developmental and does not directly determine base pay or grade. National pay awards (e.g., NJC cost-of-living uplifts) and any locally agreed arrangements apply irrespective of appraisal outcomes. Incremental pay progression within an employee's existing grade may be awarded where good performance is evidenced and agreed targets/objectives are met, these will be discussed at annual appraisal but are subject to available budget and the required Council approvals. Any other changes to pay or grade are managed through separate processes (e.g., job evaluation/regrading, honoraria) and require the appropriate Council approvals.

Capability or conduct matters are handled under the Council's capability/disciplinary procedures. Where under-performance persists despite reasonable support, the manager may refer to the capability process.

## Appraisal Procedure

- Appraisals will be carried out annually between August and the end of September.
- Committee reporting - summary outcomes and training needs are collated so that reports are completed ahead of the Autumn Staffing Committee meeting (held in the first week of October).
- Mid-year check-in: a short review is held between February and March to discuss progress, remove obstacles, and adjust objectives if priorities change.
- The Chairperson and one other member of the Staffing Committee, who are trained, impartial, and have no conflict will undertake the Town Clerk appraisal. If these criteria are not met, the Staffing Committee will appoint an alternative representative.

It is the responsibility of every Line Manager within the Council to be involved in undertaking appraisals which are designed to improve individual and organisational performance.

The appraiser will start the process by:

- Arranging a mutually convenient date, time and place for the appraisal interview.
- Ensuring that the employee has a copy of all relevant documentation.
- Give the employee an Appraisal Form (appendix 1), asking them to complete it and return it within two weeks.
- Give any further guidance or clarification on any aspect of the appraisal scheme which they may want.
- Compare job description to current role.
- Review action points and objectives from the previous appraisal.
- Consider performance over the past year.
- Look at training and development needs.
- Wellbeing and workload: discuss pressures, risks, and support.
- Agree and record development action points.

Within 10 working days of the meeting, the appraiser records:

- agreed objectives and success measures;
- development and support actions (with owners and timescales);
- any changes to role scope or JD; and
- a concise performance summary.

Both parties sign the completed form (physically or electronically). The appraisee receives a copy; the original is filed confidentially on the Personnel File.

### **Appraisal Conclusion**

Once the appraisal interview has taken place, the outcome together with any action points, objectives and training requests will be reported to the Town Clerk. The Town Clerk will consider the report and if necessary, will include any recommendations or issues in the Establishment Report for the Staffing Committee. The completed appraisal form will be placed on the staff members personnel file (both hard copy and / or electronically) for future reference.

**NEWTON ABBOT TOWN COUNCIL**  
**Staff Appraisal - 2025/26**

**SECTION 1**

Employee to Complete this Section (Use your job description and previously agreed objectives to complete this section). Please review your job description to ensure continued relevance.

<b>Name:</b>	
<b>Role:</b>	
<b>Date of Appraisal:</b>	

**2. Skills and Review of Performance Over the Past Year**

<p><b>How would you describe your overall performance during the past 12 months?</b> <i>Reflect on your key contributions, responsibilities, and general performance.</i></p>
<p><b>What aspects of your role have you performed most effectively?</b> <i>Identify areas where you feel you've excelled or added the most value.</i></p>
<p><b>Which areas of your work have been less successful or presented difficulties?</b> <i>Include reasons where relevant.</i></p>



**Do you possess any skills or strengths that are not currently being utilised in your role?**

### **3. Development Needs and Support**

**Which aspects of your job do you find most challenging, and why?**

**Has a lack of particular experience, training, or resources affected your performance?**

**What training or development have you undertaken in the past year?**

**How effective was this training or development?**

**What further training or experience would help you achieve your goals?**

#### **4. Objective and Target Setting**

**What individual objectives or targets would you like to propose for discussion?**

**Which of these should be treated as high priorities?**

**What support or resources do you need to help achieve these objectives?**  
*Refer to your role description and the Council's strategic aims when completing this section.*

(Use your job description and any Council priorities to consider what you intend to achieve next year)

**Section 2:**

Appraiser to Complete This Section

<b>Name (appraisee):</b>	
<b>Name (appraiser):</b>	
<b>Date of Appraisal:</b>	

*Consider what the employee has written in Section 1 and make comments in this section (Section 2). When you have completed the appraisal interview and agreed objectives, training and development plans the overall summary and plans for the following year should be summarised in Section 3. You should obtain the employee's comments and signature in Section 4 and give the employee a copy of the full document for their records.*

**1. Agreed Objectives** (List key objectives agreed during the appraisal discussion)

1.	
2.	
3.	
4.	
5.	

**2. Appraiser's Comments**

**Achievements: Comment on notable successes and contributions.**

**Challenges:** Provide feedback on areas for improvement or that did not go as planned.

**Role scope:** Identify any tasks to be removed or added to the job description.

**Overall Performance Summary:**

*Include strengths, development areas, and progress against previous goals.*

### **Section 3: Development and Planning**

Outline key development needs and training to support the employee's objectives.

**Training/Development Actions:**

**Section 4:**

Employee Comments

Please add any final thoughts about the appraisal process or feedback on the completed form.

**Employee Signature:**

**Appraiser Signature:**

**Date:**