

SOUTH HEIGHTON PARISH COUNCIL

Performance Management and Appraisal Policy and Protocol

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Notes and Background

The Parish Council is committed to achieving good local governance. This means that the Parish Council wants to ensure that they are doing the right things, in the right way, for the right people, in a timely, inclusive, open, honest and accountable manner.

To help the Parish Council achieve this we aim to follow the six principles of good local governance:

- 1 Focusing on the purpose of the Council and on outcomes for the community and creating and implementing a vision for the local area;
- 2 Members and officers working together to achieve a common purpose with clearly defined functions and roles;
- 3 Promoting values for the Council and demonstrating the values of good governance through upholding high standards of conduct and behaviour;
- 4 Taking informed and transparent decisions which are subject to effective scrutiny and managing risk;
- 5 Developing the capacity and capability of Members and Officers to be effective;
- 6 Engaging with local people and other interested persons to ensure robust public accountability.

As a first tier of local government the Parish Council is directed and controlled by central government legislation. This document is one of a number, which together, sets out the systems and processes of how the Parish Council works within this framework and, as importantly, our culture and values on the way we work, so that we may fulfil these six principles.

This Performance Management and Appraisal Policy and Protocol has been based on the model provided by the Sussex and Surrey Association of Local Councils (SSALC) on their website as at 18th January 2018, but adapted to apply solely to the Parish Clerk and the circumstances of South Heighton Parish Council.

It should be read in conjunction with the other adopted policies, procedures and protocols of the Parish Council such as the Council's Standing Orders and the "Roles and Responsibilities of Councillors and Officers Protocol", which deals in more detail with what is expected of Councillors and the Parish Clerk in respect of their roles, responsibilities and working relationships. In particular it should be read in association with the Parish Clerk's contract of employment and the Council's Training and Development Policy. In the case of the Parish Clerk they should refer not only to their job description (Appendix C), but also their more detailed responsibilities, related tasks and targets (Appendix D).

The protocol should also be read and will be operated in the context of relevant legislation in force at the time and any other national and local protocols adopted by the Council.

The Council is committed to being a responsible employer and the adoption and application of this Policy/Procedure is part of this commitment.

For their part the Parish Clerk is expected to contribute to the process and help develop it and comply with its principles and abide by its outcomes.

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In the context of this document reference to the “Council” and/or “Parish Council” means South Heighton Parish Council

1. Purpose of the scheme

- 1.1 The Council recognises the benefits of regular and constructive performance review and is committed to ensuring that the Parish Clerk is provided with support to enable them to work as effectively as possible.
- 1.2 One of the ways in which such support can be provided is through this performance management and appraisal scheme, which provides a systematic opportunity to:
 - i) recognise the achievements over the previous year
 - ii) identify ways in which performance can be improved to the benefit of both the Parish Clerk and the organization
 - iii) agree performance objectives and targets for the coming year
 - iv) identify development/training needs and prepare a personal development plan.
- 1.3 The Parish Clerk's performance will be reviewed on an annual basis; an interim review may be carried out six months after the main review if the Council considers it appropriate or requested by the Parish Clerk.

2. The performance review year

- 2.1 Performance will be reviewed via the appraisal process currently adopted by the Council in the autumn to inform the budget setting process. Targets and objectives will be set annually following the election of the Council and the Parish Meeting in May, which is used as a vehicle to help set the Council's priorities. Any follow up interim review will take place at an agreed time in the spring approximately 6 months later.
- 2.2 A yearly report by the Chairman will be made to the Council. Should any issues arise these will normally be dealt with by the Council's Personnel Committee.
- 2.3 All documents and forms used in the appraisal and review process should be signed and it is signed copies only that will be accepted. Only summary documents will be reported to Council and not the detailed appraisal documents and forms (see also section 8 Confidentiality).

3. Who reviews

- 3.1 The Parish Clerk's review will normally be carried out by the Chairman with the assistance of the Vice Chairman and will be conducted through the process described in Appendix A. This process involves contributions from all Members of the Council who complete a survey form (see Appendix E) considering the Parish Clerk's performance against their role and agreed targets (see Appendices C and D) to help ensure the reviews objectivity and that it reflects the views of the full Council.
- 3.2 The Council views the review as a two way process, to not only help the personal development of the Parish Clerk, but also to help ensure the Council is providing the best and most appropriate service it can to local residents whilst meeting its statutory obligations. The Council recognises that the Parish Clerk has an active and positive contribution to make to the process by the completion of sections 1 and 3 of the Appraisal Form (Appendix B). The Parish Clerk is encouraged to be frank and honest in completing this form to enable the Council to address any problems or concerns that may have arisen.

- 3.3 It is the role of the Council to ensure that a robust review process has taken place in compliance with the process currently adopted by the Council. If the Parish Clerk has concerns that the process is not being appropriately followed or at the outcome of the appraisal review these should be addressed via the appropriate procedures in the Council's Grievance Policy and will be considered by the Personnel Committee.

4. Preparation for the review

- 4.1 For performance review to be successful and effective it is essential that all those involved prepare. A programme, which must be agreed between the Council and the Parish Clerk in advance, will be set for the completion and return of forms and the review meetings in line with the currently adopted process of the Council as set out in Appendix A. All supporting paper work, which will include the record from the previous year's review and any interim review, will be issued to the various parties and returned in line with this programme.
- 4.2 The following documentation will need to be available to facilitate this process:
- i. The agreed programme (with set dates) following approval by Council in September;
 - ii. Councillor Survey Form – provided in paper form to all Councillors by the Chairman (ideally at the September Council meeting);
 - iii. The Parish Clerk's current job description – provided to Councillors to assist in the completion of their survey form and the Parish Clerk for the completion of section 1 of the Appraisal Form ;
 - iv. The Parish Clerk's current specific responsibilities, tasks and targets – provided to Councillors to assist in the completion of their survey form and the Parish Clerk for the completion of section 1 of the Appraisal Form;
 - v. A copy of the Appraisal Form – provided in paper form by the Chairman to the Parish Clerk with Section 1 of the Appraisal Form also provided in electronic form;
 - vi. The current aims and objectives of the Council prepared following the Annual Parish meeting;
 - vii. A copy of last years Appraisal Form (and Interim Appraisal if there was one) – provided to the Parish Clerk, Chairman and Vice Chairman to check progress on the previous objectives and training and development plan.

5. The job description,

- 5.1 The Parish Clerk's job description set out in Appendix C will be reviewed as part of this process, in order to ensure it is a clear reflection of the role, and may be changed by mutual agreement if there are substantial, material and permanent changes to the role.

6. General job performance, tasks and targets

- 6.1 The Council recognises that the Parish Clerk's job is formed of both a number of specific objectives and general job performance such as planning and prioritising the workload, communicating appropriately, working collaboratively with others and being flexible and adaptable. All aspects of the job will be reviewed. This will include the specific responsibilities, related tasks and targets set out in Appendix D to ensure they are still relevant and achievable and any changes will be agreed and recorded via the Appraisal Form (Appendix B).

7. Personal development and training

- 7.1 In order to carry out their role and to meet new objectives it is recognised that from time to time the Parish Clerk will need further personal development. Personal development is not simply about attending training courses. Development and training opportunities can be provided by a variety of means, but they should be realistic for both the Parish Clerk and the Council, whilst taking into account operational requirements. Opportunities may include:
- i) on or off job coaching
 - ii) mentoring
 - iii) shadowing other Parish Clerks and/or Responsible Finance Officers
 - iv) taking on new responsibilities
 - v) undertaking project work or contributing to working parties
 - vi) professional updating
 - vii) attending conferences, seminars and symposia
 - viii) training courses and workshops
 - ix) guided reading
 - x) networking
 - xi) e-learning
- 7.2 The review process will importantly be used to establish and monitor a training plan for the Parish Clerk to ensure they obtain and maintain the necessary skills and knowledge to undertake all the relevant roles associated with the job. See also the Council's Training and Development Policy.
- 7.3 The Council will support and provide opportunities and resources, where appropriate, to implement this training plan, aid the Parish Clerk in their personal development and in obtaining any appropriate qualifications related to their role.

8. Confidentiality

- 8.1 The detailed content of the review will normally be confidential between the Chairman and the Vice Chairman and the Parish Clerk. The main record of discussion will be made and retained by the Chairman and, along with all the forms and papers, held on the Parish Clerk's Personnel File. Where necessary, only summary documents will normally be reported to the the Council.

9. Responsibility for the scheme

- 9.1 The Chairman is responsible for instigating and carrying out the review in liaison with the Parish Clerk and Vice Chairman and, in association with the Vice Chairman, for subsequently setting objectives in a timely and consistent manner and for following up any agreed actions.
- 9.2 Responsibility for monitoring the process and ensuring it is carried out consistently, rests with the Council. The Chairman and Vice Chairman will monitor progress to ensure all review discussions with the Parish Clerk are carried out at the appropriate times and that the agreed personal development and training is carried out.

Appendix A

Annual Appraisal Process for the Parish Clerk

	Action	Timing
1	Agreement with the Parish Clerk at Council meeting to the timing for the programme below	September Council
2	Circulation of Councillors Survey Form to all Members by Chairman	ASAP after the Council when programme agreed and no less than 4 weeks before interview
3	Issuing of Appraisal Form and past Appraisal to Clerk by Chairman	4 weeks before interview
4	Councillors Survey Forms returned to Chairman from Members	2 weeks before interview
5	Appraisal Form with section 1 completed and returned to Chairman by Clerk	2 weeks before interview
6	Chairman collates Members comments and prepares Summary Survey Form for Clerk	2 weeks before interview
7	Chairman provides copy of Summary Survey Form to Clerk	1 week before interview
8	Appraisal Interview with Chairman and Vice Chairman. Consideration of issues raised by Clerk and Members; review objectives, tasks and targets; training plan and set new objectives and actions to address issues and fulfil Council's aims and objectives and review training plan	At pre agreed date
9	Chairman and Vice Chairman prepare Appraisal Form completing section 2 with new objectives and actions with target dates where appropriate in light of interview discussions	1 week after interview
10	Appraisal Form circulated by Chairman to Clerk for completion of section 3	1 week after interview
11	Completed Appraisal Form returned by Clerk to Chairman	2 weeks after interview
12	Any outstanding issues from section 3 considered at Chair and Clerk's meeting (Vice Chair to attend if appropriate)	As per agreed C/C date
13	Chairman prepares final Appraisal Form based on discussions on any outstanding issues and agreed further actions set out in section 4	1 week after C/C meeting
14	Final Appraisal Form circulated by Chairman to Clerk and Vice Chairman	1 week after C/C meeting
15	Chairman prepares summary report for Council to seek agreement on new objectives, actions, changes to targets and training plan	For November Council meeting
16	Final Form signed off by Clerk, Chairman and Vice Chairman following agreement of objectives and training plan by Council as part of reporting back procedure.	At November Council meeting.

Half Year/Interim Appraisal

(to be undertaken if considered necessary by Council, or requested by Parish Clerk)

	Action	Timing
1	Chairman considers progress against objectives and actions and completion of targets based on report to previous Council on full Appraisal, in liaison with Vice Chairman	2 weeks prior to agreed C/C meeting with Parish Clerk
2	Chairman prepares summary report paper	Completed 1 week before agreed C/C meeting
3	Chairman's summary report paper circulated to Clerk	1 week before agreed C/C meeting
4	Summary report paper and any issues discussed (Vice Chair to attend if appropriate)	As per agreed C/C meeting
5	Chairman prepares progress report (based on summary report paper) and results of discussions, in liaison with Vice Chairman	Completed 1 week before next Council meeting
6	Chairman reports back to Council	At next Council meeting following agreed C/C meeting

PARISH CLERK'S APPRAISAL FORM

Agreed Programmed Date of Appraisal Interview:

Introduction

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

The aims of the review are:

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

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 have to 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 have adequate time to review this and consider the completion of section 2.

You will receive a copy of the summary of the Councillors survey prior to the interview, which will be used by the Chairman and Vice Chairman to complete section 2 part 3. Please consider any issues that may be raised by this and how they may be addressed prior to the appraisal interview.

At the appraisal interview you will jointly agree with the Chairman and Vice Chairman 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 Chairman of the Council)

Consider what the Parish Clerk has written in Section 1 and make your comments in Section 2 for discussion at the appraisal interview. The results of the Councillors' survey, a summary of which should be provided to the Parish Clerk one week prior to the appraisal interview is a key factor in this and should be incorporated in your appraisal and discussions. 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 as per the agreed programme.

The following documents should be available and provided to the Parish Clerk:

- Agreed Programme (Appendix A)
- Previous Appraisal/Review (Appendix B)
- Clerk's Job Description (Appendix C)
- Specific Responsibilities and Targets Appendix D)
- Summary of Councillors' Survey

PARISH CLERK'S APPRAISAL FORM SECTION 1

(to be completed by Parish 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 (set following the Annual Parish Meeting) 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:

Date completed by Parish Clerk:

Date received by Chairman:

PARISH CLERK'S APPRAISAL FORM SECTION 2

(to be completed by Chairman and Vice Chairman)

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 has not gone well:

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:

The above Objectives and Training Plan will be presented to the Council for formal approval in line with the agreed review programme.

PARISH CLERK'S APPRAISAL FORM SECTION 3

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)

SECTION 4

Chairman and Vice Chairman's 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

Vice Chairman

Date:

Date:

Signature of Parish Clerk:

Date:

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 SSALC Ltd. , Society of Local Council Clerks, and other relevant bodies, as a representative of the Council as required.

PARISH CLERK'S SPECIFIC RESPONSIBILITIES, RELATED TASKS AND TARGETS

Overall Responsibilities

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.

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.

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. 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.

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

Specific Responsibilities, Related Tasks and Targets

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

Task: **a)** Serving Council meeting Summonses on Members in an appropriate form prior to meetings as per the agreed programme of Council meetings.

Target(s): *i) Send meeting Summons to all Councillors to be received by no later than four working days (excluding Sundays) prior to the meeting.*

ii) Produced to comply with statutory requirements and to a high standard.

Task: **b)** Providing copy of Summons to nominated Member for display on Council noticeboards prior to meetings as per the agreed programme of Council meetings.

Target(s): *i) Send meeting Summons to nominated Member to be received by no later than four working days (excluding Sundays) prior to the Council meeting.*

ii) Produced to a high standard.

Task: **c)** Programming Council and Committee meeting(s) and booking venues.

Target(s): *i) Create a balanced timetable of meetings completed for the annual May Council meeting.*

ii) No errors in programme or bookings.

Task: **d)** Preparing and Updating Council's Programme of Standing Items.

Target(s): *i) Create a Standing Items Programme for the annual May Council meeting.*

ii) Update the Standing Items Programme after each Council meeting prior to the following Chair/Clerks meeting for reference to assist in the preparation of the next Council Agenda.

iii) Programme produced to a high standard.

2. Responsibility – To monitor and balance the Council's accounts and prepare records for audit purposes and VAT; *fulfilling the requirements of the Parish Council's Financial Regulations and the Transparency Code for smaller Councils.*

Task: **a)** Prepare and report account balances to each Council meeting.

Target(s): *i) Include a Balances Report with each Council Agenda sent to be received by Members no later than four working days (excluding Sundays) prior to the Council meeting.*

ii) reports produced to a high standard with no financial errors.

- Task: **b)** Prepare and report Quarterly Reconciliation to the appropriate meetings of the Council.
Target(s): *i) Prepare and report a Reconciliation Report to four of the Council meetings as per the Standing Items Programme, sent to be received by Members no later than four working days (excluding Sundays) prior to the relevant Council meeting.*
ii) Reports produced to a high standard with no financial errors.
- Task: **c)** Prepare and report Quarterly Budgetary Reviews to the appropriate meetings of the Council.
Target(s): *i) Prepare and report a Quarterly Budgetary Review Report to four of the Council meetings as per the Standing Items Programme, sent to be received by Members no later than four working days (excluding Sundays) prior to the relevant Council meeting.*
ii) Produced to a high standard with no financial errors.
- Task: **d)** Prepare and report the Council's Annual Financial Return to the appropriate meeting of the Council.
Target(s): *i) Prepare and report the Council's Annual Financial Return to the relevant Council meeting as per the Standing Items Programme, sent to be received by Members no later than four working days (excluding Sundays) prior to the meeting.*
ii) Produced to a high standard with no financial errors.
- Task: **e)** Publish the relevant financial information on the Council's website to comply with the requirements of the Transparency Code.
Target(s): *i) Publish the relevant information within four days of the last Council meeting.*
ii) Produced to a high standard with no financial errors.
- Task: **f)** Manage and monitor the Council's bank accounts.
Target(s): *i) Report any issues in a timely manner to the Council.*

3. Responsibility – To ensure that the Council's obligations for Risk Assessment are properly met.

- Task: **a)** Prepare and maintain an appropriate Inventory of Assets.
Target(s): *i) Prepare and report the Council's Inventory of Assets to the annual May Council meeting.*
ii) Produced to a high standard.
iii) Update as necessary and report any changes in a timely manner to the Council.
iv) Inventory accurate and produced to a high standard.
- Task: **b)** Ensure appropriate insurance cover to cover the Council's obligations.
Target(s): *i) Prepare and report an Annual Insurance Cover Review as per the Standing Items Programme, sent to be received by Members no later than four working days (excluding Sundays) prior to the relevant Council meeting.*
ii) Review and reports produced to a high standard.
iii) Update as necessary and report any changes in a timely manner to the Council.
- Task: **c)** Ensure appropriate inspection of Council owned equipment (ie play area and green gym) and recommend, or arrange for the undertaking of, appropriate action to address any issues.
Target(s): *i) Prepare and report an Annual Inspection Review to the Council as per the Standing Items Programme, sent to be received by Members no later than four working days (excluding Sundays) prior to the relevant Council meeting.*
ii) Review and report produced to a high standard.
iii) Update as necessary and report any changes in a timely manner to the Council.
- a. **Responsibility** – To prepare, in consultation with appropriate Members, Agendas for meetings of the Council and Committees. To attend such meetings and prepare minutes for approval.
- Task: **a)** Prepare in consultation with the Chairman an annual programme of Chairman/Clerk's Agenda Setting meetings.

- Target(s):* i) *Meet the Chairman and agree an annual programme of Chairman/Clerk's Agenda Setting meetings following the annual May Council meeting at least two weeks before the first programmed Council meeting.*
ii) *Produced to a high standard with accurate dates and programme.*
iii) *Update as necessary at each Chairman/Clerk's Agenda Setting meeting.*

Task: **b)** Prepare and issue Council meeting Agendas as per the agreed programme of Council meetings.

- Target(s):* i) *Prepare and send initial draft Agenda to the Chairman and all Councillors requesting any additional items within four days of last Council meeting.*
ii) *Prepare revised Agenda and send to the Chairman at least four days prior to the programmed Chairman/Clerk's Agenda Setting meeting.*
iii) *Prepare and send final Agenda to all Councillors to be received by no later than four working days (excluding Sundays) prior to the Council meeting.*
iv) *Agendas produced to a high standard.*

Task: **c)** Prepare and issue Council meeting Minutes.

- Target(s):* i) *Prepare and send initial draft Minutes to the Chairman within four days of Council meeting they refer to.*
ii) *Agree draft Minutes with Chairman within 10 working days of the Council meeting they refer to.*
iii) *Prepare and send final Minutes to all Councillors within 15 working days of the Council meeting they refer to.*
iv) *Minutes produced to a high standard*

4. Responsibility – To attend all meetings of the Council

Task: **a)** Maintain an Attendance Record for all Council meetings.

- Target(s):* i) *Achieve 100% attendance.*

Task: **b)** Oversee the preparation of meeting rooms to ensure they are laid out and equipped appropriately for the Council meeting and presentation of any/all Agenda item(s).

- Target(s):* i) *Achieved prior to the programmed start of the meeting.*
ii) *No unnecessary disruption to meeting, through layout or lack of equipment.*

a. Responsibility – 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.

Task **a)** Maintain a Log of and respond to, circulate to relevant Councillors, or report to Council as appropriate the correspondence and/or documentation received by the Council.

- Target(s):* i) *Log correspondence/documentation within 24hours of receipt.*
ii) *Acknowledge or respond to correspondence/documentation where necessary and appropriate within two days of receipt.*
iii) *Report Log entries to the next Council meeting.*
iv) *To respond to correspondence/documentation reported to the Council as instructed within three days of the Council meeting.*
v) *Responses produced to a high standard.*

Task **b)** Monitor the Council's email account and respond to, circulate to relevant Councillors, or report to Council as appropriate.

- Target(s):* i) *Monitor the Councils email account(s) daily.*
ii) *Acknowledge or respond to emails where necessary and appropriate within two days of receipt.*

iii) Inform/circulate emails to appropriate Councillors within two working days of receipt.

iv) Where necessary report relevant emails to the next Council meeting.

v) Respond to emails reported to the Council as instructed within two days of the Council meeting.

vi) Responses produced to a high standard.

5. Responsibility – 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.

Task: **a)** Report invoices for goods and services to be paid for by the Council to each Council meeting.

Target(s): *i) Include an Invoice Table Report with each Council Agenda sent, to be received by Members no later than four working days (excluding Sundays) prior to the Council meeting.*

ii) Report produced to a high standard with no financial errors.

iii) Make payments as appropriate and instructed by the Council within three days of the Council meeting.

Task: **b)** Prepare and report Quarterly Reconciliation to the appropriate meetings of the Council.

Target(s): *i) Prepare and report a Reconciliation Report to four of the Council meetings as per the Standing Items Programme, to be received by Members no later than four working days (excluding Sundays) prior to the relevant Council meeting.*

ii) Reports produced to a high standard with no financial errors.

Task: **c)** Prepare and submit appropriate timesheets, mileage claims and expenses forms for approval by the Council.

Target(s): *i) Prepare draft completed forms to the Chairman at the Chairman/Clerk's Agenda Setting meetings prior to each Council meeting for signing.*

ii) Submit completed forms to each Council meeting for authority for payment.

iii) Forms completed to a high standard with no financial errors.

iv) Make payments as appropriate and instructed by the Council within three days of the Council meeting.

Policy Responsibilities

6. 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.

7. 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.

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

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

Parish Meeting Responsibilities

10. To issue notices and prepare agendas and minutes for the 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.

Publicity Responsibilities

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

Training and Professional Development Responsibilities

- 12.** To attend training courses or seminars on the work and role of the Clerk as required by the Council.
- 13.** 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.
- 14.** 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.
- 15.** To attend the Conference of the Sussex Association of Local Councils, Society of Local Council Clerk's, and other relevant bodies, as a representative of the Council as required.

PARISH CLERK – COUNCILLOR SURVEY FORM	
THIS REPORTING PERIOD	

GENERAL ASSESSMENT OF PERFORMANCE OF DUTIES

Scoring Process

Tick the box you believe reflects most appropriately how the Parish Clerk has performed over the period, based on the descriptions below adding any comments in the main box.

- A Well above the performance expected
- B Consistently above the acceptable standard of the grade
- C Generally achieves the acceptable standard of the grade. Meets all the requirements of the job
- D Not quite up to an acceptable standard, shows some general weaknesses
- E Consistently below the acceptable standard
- F Performance well below the expected level

You may find it easier to complete the more detailed Responsibilities Section on the next pages before completing this general section. Please refer to the **Annual Appraisal - Clerk’s Responsibilities, Tasks and Targets** which should also help you measure performance more objectively.

1 Knowledge of Duties <i>Comments</i>	A	B	C	D	E	F
	<input type="checkbox"/>					
2 Quality of Work <i>Comments</i>	A	B	C	D	E	F
	<input type="checkbox"/>					
3 Quantity of Work <i>Comments</i>	A	B	C	D	E	F
	<input type="checkbox"/>					
4 Relations With Others <i>Comments</i>	A	B	C	D	E	F
	<input type="checkbox"/>					
5 Communication Skills <i>Comments</i>	A	B	C	D	E	F
	<input type="checkbox"/>					
6 Skills <i>Comments</i>	A	B	C	D	E	F
	<input type="checkbox"/>					
<p>General Comments</p> <p>Strengths</p> <p>Weaknesses</p>						
<p>OVERALL ASSESSMENT <input type="checkbox"/> Acceptable <input type="checkbox"/> Neutral <input type="checkbox"/> Not Acceptable</p>						

<p>1 Responsibility - To ensure that statutory and other provisions governing or affecting the running of the Council are observed.</p> <p><i>Comments:</i></p>	A	B	C	D	E	F
	<input type="checkbox"/>					
<p>2 Responsibility - To monitor and balance the Council's accounts and prepare records for audit purposes and VAT; fulfilling the requirements of the Parish Council's Financial Regulations and the Transparency Code for smaller Councils.</p> <p><i>Comments:</i></p>	A	B	C	D	E	F
	<input type="checkbox"/>					
<p>3 Responsibility - To ensure that the Council's obligations for Risk Assessment are properly met.</p> <p><i>Comments:</i></p>	A	B	C	D	E	F
	<input type="checkbox"/>					
<p>4 Responsibility - To prepare, in consultation with appropriate Members, Agendas for meetings of the Council and Committees. To attend such meetings and prepare minutes for approval.</p> <p><i>Comments:</i></p>	A	B	C	D	E	F
	<input type="checkbox"/>					
<p>5 Responsibility - To attend all meetings of the Council. <i>Comments</i></p>	A	B	C	D	E	F
	<input type="checkbox"/>					
<p>6 Responsibility - 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. <i>Comments</i></p>	A	B	C	D	E	F
	<input type="checkbox"/>					
<p>7 Responsibility - 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. <i>Comments</i></p>	A	B	C	D	E	F
	<input type="checkbox"/>					

Policy Responsibilities	A	B	C	D	E	F
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.	<input type="checkbox"/>					
<i>Comments</i>						
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.						
10. To monitor the implemented policies of the Council to ensure they are achieving the desired result and where appropriate suggest modifications.						
11. To act as the representative of the Council as required.						

Parish Meeting Responsibilities	A	B	C	D	E	F
12. To issue notices and prepare agendas and minutes for the 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. <i>Comments:</i>	<input type="checkbox"/>					

Publicity Responsibilities	A	B	C	D	E	F
13. To prepare, in consultation with the Chairman, press releases about the activities of, or decisions of, the Council. <i>Comments:</i>	<input type="checkbox"/>					

Training and Professional Development Responsibilities	A	B	C	D	E	F
14. To attend training courses or seminars on the work and role of the Parish Clerk as required by the Council.	<input type="checkbox"/>					
<i>Comments:</i>						
15. 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.						
16. 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.						
17. To attend the Conference of the Sussex Association of Local Councils, Society of Local Council Clerk's, and other relevant bodies, as a representative of the Council as required.						

If you have any comments on the Appraisal Process, or ideas on how it may be improved please enter them in the space below.

Similarly if you have any comments or ideas on how the Parish Clerk may improve their service to the Council please enter them in the space below.

If you have any specific projects or tasks you would like to see completed by the Parish Clerk over the next year please enter these in the space below.

Signature	Name
	Date: