

Appraisal and Performance Review Policy



Adopted by:	Watton Town Council
Date:	April 2026
Review date:	April 2029

1. Purpose and Scope

1.1 This policy explains how Watton Town Council will approach appraisal and performance review. Its purpose is to support constructive feedback, clarify expectations, identify development needs and help employees perform effectively in their roles.

1.2 The Council recognises that, as a small employer, appraisal arrangements should be practical, proportionate and capable of being applied consistently. The emphasis of this policy is on supportive performance review and development rather than an overly formal process.

1.3 The Council uses the NJC Green Book (2024) and the NALC Model Contract of Employment (2023) as guidance when determining employment terms and conditions. Not all provisions apply automatically. Where this policy, an employee's contract, or another adopted Council policy sets out a local arrangement, that local arrangement will apply.

1.4 This policy applies to employees of Watton Town Council. It does not apply to councillors in their elected capacity, although councillors may be involved in appraisal arrangements for the Clerk or in staffing governance, in accordance with the Council's governance arrangements.

1.5 This policy should be read alongside the Capability Policy, Training and Development Policy, Sickness and Absence Policy, Equality, Diversity and Inclusion Policy, Disciplinary Procedure, Data Protection Policy and Employee Privacy Notice.

1.6 This policy is non-contractual and may be amended by the Council from time to time, subject to any contractual rights that apply.

2. General Principles

2.1 Appraisal and performance review should be a two-way process. It should give employees a fair opportunity to discuss achievements, challenges, wellbeing, support needs and future development.

2.2 The Council will seek to apply this policy fairly, consistently and without discrimination. Objectives and expectations should be realistic, relevant to the role and proportionate to the Council's size, resources and operational needs.

2.3 This policy does not create an automatic right to salary progression, incremental progression or any other pay increase. Pay decisions will be governed by the employee's contract and any separate Council decision or adopted pay arrangements.

2.4 Appraisal is separate from disciplinary action. Where concerns relate to conduct, they will normally be dealt with under the Disciplinary Procedure. Where concerns relate to capability or

attendance, they may be managed under the Capability Policy or Sickness and Absence Policy where appropriate.

3. Review Arrangements

3.1 The Council aims to hold a structured performance review for employees at reasonable intervals. In most cases this will normally include at least one formal review discussion during the year, supported by informal supervision or check-in meetings as needed.

3.2 Because management responsibilities within the Council are being developed gradually, the exact format and timing of reviews may vary depending on the role, the experience of the manager and operational demands. The Council may therefore use a proportionate approach while management arrangements continue to develop.

3.3 Nothing in this policy requires the Council to operate a rigid annual appraisal cycle if that would not be practical or proportionate at a particular time. However, employees should still receive reasonable feedback, support and opportunity for review.

4. Who Conducts the Review

4.1 An employee's review will normally be carried out by the Clerk or the appropriate line manager.

4.2 The Clerk's review will normally be carried out in accordance with the Council's staffing governance arrangements, usually by councillors authorised to do so.

4.3 Where a manager is new to line management responsibilities or would benefit from support, the Council may use a supported or shared approach to the review process so that the procedure is applied fairly and consistently.

5. Content of a Review

5.1 A review meeting may consider the employee's main duties, progress since the last review, quality of work, working relationships, attendance, conduct, contribution to Council priorities, and any practical issues affecting performance.

5.2 The discussion should also cover training and development needs, support required from the Council, workload, wellbeing and any adjustments that may be needed.

5.3 Where appropriate, objectives may be agreed for a future period. These should be clear, realistic and relevant to the employee's role. They should not be set in a way that is unreasonable, unclear or impossible to measure in practice.

6. Notes and Records

6.1 A brief written note or appraisal form will normally be completed following a formal review. This should summarise the main points discussed, any objectives agreed, any support or training identified, and any follow-up action required.

6.2 The employee should be given an opportunity to comment on the record. A difference of view does not prevent the Council from keeping a record, but any material disagreement should be noted.

6.3 Appraisal records will be kept securely and handled in accordance with the Council's Data Protection Policy and Employee Privacy Notice.

7. Performance Concerns

7.1 Where a review identifies concerns about performance, the Council will normally seek to address those concerns first through discussion, clarification, support, training, supervision or a reasonable improvement period.

7.2 The purpose of raising concerns at review stage is to support improvement at an early point. Only where concerns continue, are serious, or cannot reasonably be addressed informally, will the Council consider a more formal process under the Capability Policy or another relevant procedure.

7.3 Where performance is affected by health, disability or another protected issue, the Council will consider whether adjustments, support or another appropriate response is needed.

8. Training and Development

8.1 The Council recognises that effective review should feed into learning and development. Training needs identified through appraisal may include induction, refresher learning, role-specific training, health and safety training, line management support, qualifications or other development relevant to the employee's role.

8.2 Any agreed development activity will be subject to the Council's operational requirements, available resources and any separate Training and Development Policy or budget arrangements.

9. Equality, Dignity and Confidentiality

9.1 Appraisal discussions should be conducted respectfully and in private. The process should be free from discrimination, bullying, harassment or unreasonable treatment.

9.2 Employees may raise concerns about the way a review has been handled informally in the first instance. If a concern cannot be resolved informally, the employee may use the Grievance Procedure.

10. Monitoring and Review

10.1 The Council will keep this policy under review and may amend it where required by changes in law, guidance, Council decision or operational practice.

10.2 This policy will be applied in a way that is proportionate to the size, resources and management structure of Watton Town Council while supporting fair treatment, reasonable feedback and effective performance management.