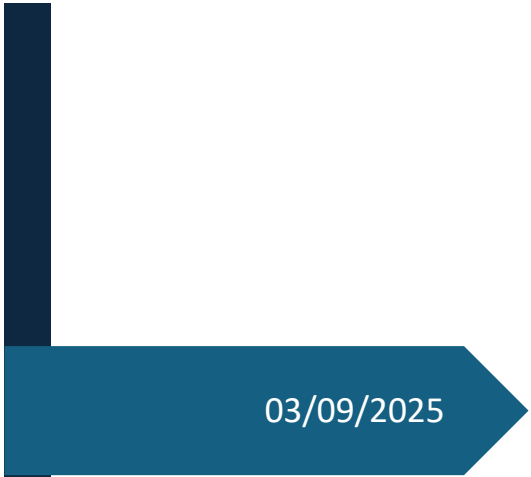
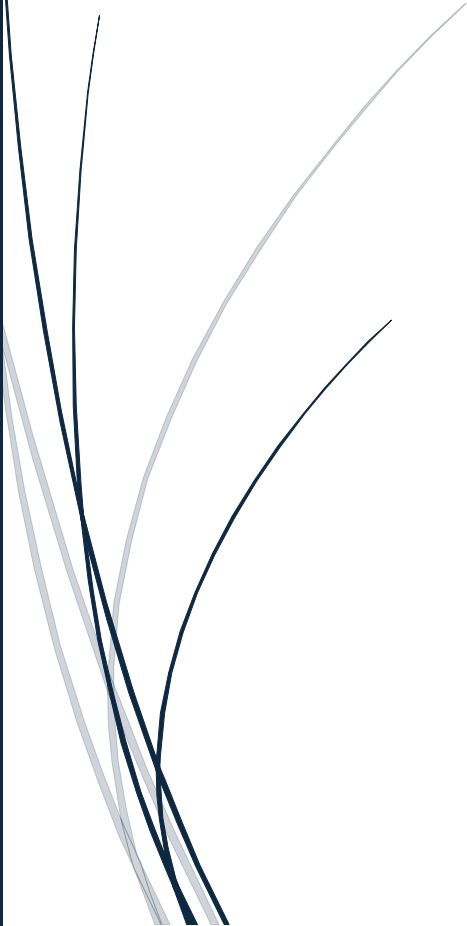


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03/09/2025

Appraisal Policy

Parish Clerk/RFO

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LATHOM SOUTH PARISH COUNCIL

Lathom South Parish Council
Appraisal Policy – Parish Clerk/Responsible Financial Officer

Lathom South Parish Council currently employs one member of staff: the Parish Clerk, who also undertakes the duties of the Responsible Financial Officer (RFO). This policy outlines the appraisal process for that dual role.

Purpose of the Appraisal

The appraisal process provides a structured opportunity for the Clerk and appointed councillors to review performance in relation to agreed objectives and to identify areas for development. The aim is to support the Clerk's professional growth while ensuring their work continues to align with the needs and objectives of the Council.

Appraisal Timeline

An annual performance appraisal will be conducted close to the anniversary of the Clerk's start date. Appointees to the post will undertake monthly review meetings that will be held during the initial probationary period. Upon successful completion of this period, quarterly review meetings will take place until the first annual appraisal.

Appraisers

The appraisal process will be managed by Lathom South Parish Council. Two councillors will be appointed to carry out the appraisal, one of whom will normally be the Chairman of the Council.

Preparation for the Appraisal

Prior to the appraisal meeting, feedback will be gathered. The appointed appraisers will invite all councillors to contribute comments on the Clerk's performance and any professional development needs. The Clerk may also identify individuals who can provide relevant input.

A target date for the completion of the appraisal will be agreed in advance. To support the process, the Clerk is encouraged to reflect on the questions listed in *Appendix A:*

Preparation for Appraisal – Appraisee. These notes are for preparation only and will not be included in the final appraisal document.

The appraisers will also prepare by reviewing the questions in *Appendix A: Preparation for Appraisal – Appraiser*, considering input from other councillors. These notes are likewise intended to support the process but will not form part of the official appraisal record.

Appraisal Meeting

In preparation for the meeting, the Clerk will receive a draft copy of the appraisal for comment. The appraisal meeting is intended to be a positive and open two way conversation focused on performance and professional development. The meeting will include the following key elements:

- Review and reference to any performance discussions held throughout the year
- Reflection on the objectives set during the previous appraisal
- Discussion of both successes and any concerns or challenges
- Setting of new objectives for the coming year
- A summary of the meeting and confirmation of agreements reached

The outcomes of the appraisal will be formally documented on the **Performance Appraisal Form** (Appendix B). This record includes:

- A summary of the key points discussed
- Agreed objectives for the next appraisal period
- Any identified training or development needs

Copies of the completed and signed form will be securely held by both the appraisers and the Clerk.

Confidentiality

All confidential information about employees, councillors, or members of the public that is discussed by Lathom South Parish Council in the course of its business will be treated with strict confidentiality. Information will only be shared where it is necessary for the proper conduct of Council business or where required by law. Councillors and employees must not disclose confidential information to any third party without proper authority. Breaches of confidentiality may be considered a disciplinary matter.

Lathom South Parish Council
Appendix A – Appraisal Preparation Questions

For the Clerk / Responsible Financial Officer

Before the appraisal meeting, please take time to reflect on the following questions. These will help focus the discussion and ensure your views are considered as part of your ongoing development and support.

1. Which parts of your role do you feel most confident and successful in?

2. Are there any tasks or responsibilities you find particularly challenging?

3. What ideas do you have for addressing or improving any difficulties you've identified?

4. Is there any training or development you feel would help you in your role?

5. Do you feel there's any additional support you need from the Council or individual councillors?

6. What do you see as your key goals or focus areas over the next 6 to 12 months?

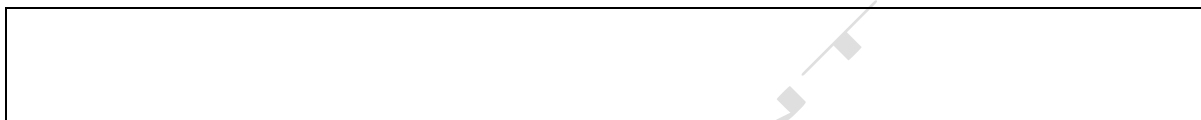
For the Appraisers (with input from all councillors)

These questions are designed to help councillors reflect on the Clerk's performance and future priorities ahead of the appraisal meeting. All members of the Council are encouraged to contribute their views to support a fair and informed discussion.

1. What are the Council's key expectations of the Clerk/RFO, based on the current job description?



2. In what ways has the Clerk demonstrated strengths, achievements or a positive impact over the past year?



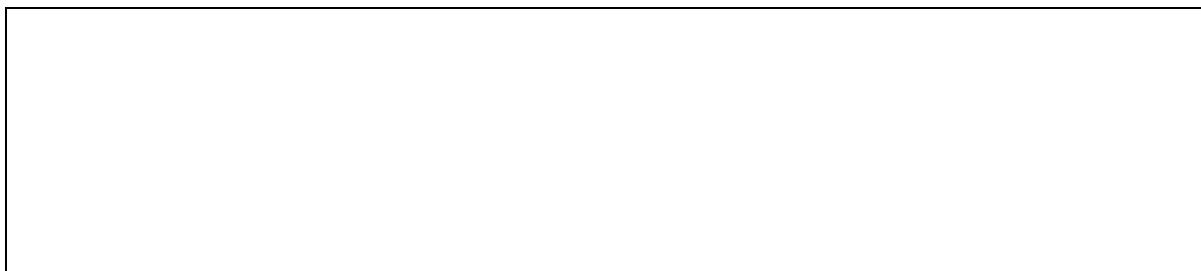
3. Are there any areas where performance could be improved or where concerns have arisen? (Please provide examples where relevant.)



4. What are the Council's priorities or main objectives for the next 12 months?



5. How can the Clerk/RFO play a key role in helping the Council meet those priorities?



Lathom South Parish Council
Appendix B – Lathom South Parish Council Development and Appraisal Form

Name:	Job Title:
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Period under review	From:	To:
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Date of meeting:

Review of performance (with reference to post description & previous years' objectives)

What went well? What went less well? What obstacles hindered progress? What changes (if any) are proposed to the post description?	
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Agreed objectives for next year

What are the objectives for the next year? Objectives should represent priorities for the coming year in line with the Parish Council objectives.	
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Personal Development

What are the needs and opportunities for training and development in the next year? What will be the commitment (time, cost) and what will the outcome(s)?	
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Signed & dated:

Clerk		Appraisers	
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Adopted by the Lathom South Parish Council meeting held on: _____