Welshpool Town Council

Town Clerk Performance Management Framework

Welshpool Town Council are committed to enhancing the individual performance and potential of our staff and will provide the necessary feedback, and support, and training to ensure that high standards of performance are maintained throughout the council. This Framework is specific to the role of the Town Clerk due to the unique nature of this post.

The Town Clerk does not have a single direct line Manager. Their employer is Welshpool Town Council. However, it is not reasonable to be line managed by 15 individuals all with competing views and priorities. In addition, no single member of the Council can issue instructions to the Town Clerk.

This Framework provides guidance to the Council and the Town Clerk to meet its strategic objectives and maintain the high standards of performance and leadership required in the role of Town clerk.

For Welshpool Town Council, the **Town Mayor** has been delegated to act as the Clerk's line manager for the purposes of day to day working arrangements, performance management and appraisals. Should the Clerk need any support or assistance it is the Town Mayor they should go to. In the absence of the Town Mayor, it should be the Deputy Town Mayor. In the event of neither being available, it should then be the Chair of Finance.

This Framework sits alongside the Council's Staff Appraisal Policy.

INDUCTION – Newly appointed Town Clerk (Clerk)

Where a new Clerk is appointed a robust, good practice induction process will be delivered within the first month of employment.

The Town Mayor will be responsible for overseeing the induction process; however, all staff and Councillors will be responsible for welcoming the new Clerk to the organisation and assisting in completing the Induction Process.

An Induction Checklist will be provided to the new Clerk, who will sign the form on completion of the individual tasks. The individuals responsible for delivering the items on the induction checklist will also sign when it is completed.

Once the whole induction checklist is completed the Town Mayor and the Clerk will sign that it is completed, and a copy will be retained in the Clerk's personnel file.

It is important to note that not everything can be covered within the first month of employment, therefore induction is an ongoing process

First Appraisal

Within the first month of Induction, the Town Mayor will conduct the Clerk's first appraisal.

As part of this appraisal they will :-

- Agree: on future SMART (Specific, Measurable, Achievable, Realistic and Time-bound) performance objectives to be achieved within the probationary period. These should be appropriate to a new member of staff and reflect some of the priorities of the Council.
- Plan: identify any immediate training and development needs not included within the induction process and plan for implementation including costs, budget and timescales.
- Agree: Communication and working and informal meeting arrangements for the next six months. The Mayor and Town Clerk should hold a minimum of monthly one to ones at this stage to identify any issues and positive performance an early stage.

The Probation Appraisal

An informal probation review should take place at the 3-month stage to discuss performance and address any issues raised by both the Clerk and Town Mayor, supplemented by monthly 1-2-1 meetings to ensure a good standard of communication is maintained.

On or around the 6-month anniversary of the Clerk's starting date, the Town Mayor will arrange a Fromal Probationary Interview. The guidance for preparation in the general Appraisal Policy applies in this case as well.

The Formal Probation Interview will be carried out by the Town Mayor, who may request that they are accompanied by the Deputy Town Mayor or the Chair of Staffing Committee, who will make notes of the discussion on the Town Mayor's behalf.

The Clerk may also be accompanied by a representative if they wish.

Should there have been any significant issues with performance up until this stage, these should already have been identified and discussed at previous performance management meeting.

In this interview the Town Mayor will:-

- Review: Performance against the objectives agreed and set at the Induction Appraisal.

- Analyse: What went well? What could have gone better. Discuss any issues that may have hindered performance – if any.

If there are significant concerns about performance during the probationary period, and these cannot be resolved then the interview may be terminated at this point. If this is not the case then: -

- Plan: Any future training/development/support needs
- Agree: on future SMART (Specific, Measurable, Achievable, Realistic and Time-bound) performance objectives to be achieved within the probationary period. These should be appropriate to a new member of staff and reflect some of the priorities of the Council.
- Agree any increment of pay scale associated with successful completion of the probation period.

Following the Probation Appraisal

After the interview, the Town Mayor should write up a summary of the main points from the meeting and any objectives agreed upon and training/development/support agreed using the Council's Appraisal Form.

This should then be forwarded to the Clerk, for checking and comments, and be signed by both the employee and appraiser with a copy to be retained by the employee and a second signed copy stored in the employee's personnel file.

The Town Mayor may make one of 3 recommendations:

1. To end the probationary period and the Clerk becomes a permanent member of staff and received the agreed increment in pay scale.
2. To extend the probationary period for a further 6 months with no increment in pay scale.
3. To terminate the Clerk's appointment.

The Town Mayor's recommendation and summary supporting evidence will be made to Full Council in the Confidential Sessions.

Should the Council agree with the Town Mayor's recommendation then the Clerk will be given 1 weeks' notice.

Should option 2 be agreed on then the probation process will also apply at the end of the subsequent 6-month period

The Town Clerk Appraisal Process

The next full appraisal of the Clerk should take place on or around the first anniversary of the start of their employment

The Clerk should be given adequate notice of appraisal interviews.

Welshpool Town Council will use a version of the 360-degree feedback process to assist the Town Mayor in carrying out a rounded appraisal of the Clerk, which is evidence based.

Stage 1: A Self-assessment form is completed by the Clerk before their interview on their own performance against the objectives they were set and any other performance of significance. They should also gather the evidence that backs up their self-assessment.
Stage 2. The Town Mayor will carry out their own preparations for interview as recommended in the Staff Appraisal Policy
Stage 2: A direct report evaluation will be requested to be carried out by the members of staff that are line managed by the Clerk. A pro forma will be supplied to focus attention on specific performance. The opinion given must be backed up by evidence.
Stage 3: The Town Mayor may request that evaluations of the Clerk's performance are carried out by between 3-5 Chairs of Council Committees. The Town Mayor should have regard to the relevance of the Clerks performance objectives for the year when selecting the Chairs.
These evaluations will be requested at least two weeks prior to the interview taking place. If not supplied then the interview will continue without them.

The Appraisal interview will be carried out by the Town Mayor, who may request that they are accompanied by the Deputy Town Mayor or the Chair of Staffing Committee, who will make notes of the discussion on the Town Mayor's behalf.

Following the Interview

After the interview, the Town Mayor should write up a summary of the main points from the meeting and any objectives agreed upon using the Council's Appraisal Form.

This should then be forwarded to the Clerk for checking and commenting on. Once agreed it should be signed by both the Clerk and the Town Mayor, with a copy to be retained by the Clerk and a second signed copy stored in the Clerk's personnel file.

Reporting: -

Any training needs identified by the Clerk's Appraisal Process will be included in the following year's Training Plan and presented to the relevant Committee and subsequently Full Council, annually, for approval.

The Town Mayor and the Clerk themselves are responsible for following up on any actions required as part of the appraisal process.

In addition to regular routine meetings between the Town Mayor and Town Clerk, there should be a review of the appraisal after six months. Any concerns or issues should be highlighted by either party at this meeting and not saved up to the end-of-year appraisal.

The Clerk may use the Grievance Procedure in the event of problems over the accuracy or the fairness of the appraisal record or meeting.

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