



**STAFF APPRAISAL
POLICY AND PROCEDURE**

Version	Date	Author	Notes
1	03 Nov 25	DF	Estab/ Policy Committee Approval
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Information

Every person who works within Ramsey Town Commissioners (RTC) (The Authority) is expected to perform their duties to the best of their ability. As well as taking personal responsibility, the Authority should also ensure that they play their part, by providing a Psychologically Safe workplace, where it is safe to learn, safe to have a voice, safe to contribute and safe to challenge, and through regular dialogue where both performance and training needs are examined.

Policy

Ramsey Town Commissioners values its employees and seeks to support them in their personal and professional development.

The Authority will create and maintain a Personal Development Review process which gives individual employees and their manager an opportunity to review performance, work content, loads and volume, to look back on what has been achieved during the past year then agree future objectives. The process will provide for agreement on personal objectives, and any learning and development requirements which may help.

Employees will;

- know what is expected of them, including the required standard of performance and how they should do their jobs.
- receive regular and timely feedback which aims to improve and develop performance and recognise their achievements.
- reflect on their own performance and Identify areas where improvement and training is required
- have a mutually agreed plan to achieve both development goals and career development.

The Authority will ;

- Set appropriate and sustainable standards.
- Provide advice and guidance to managers and employees
- Ensure that appropriate training and development is available for managers and employees.
- Ensure that appraisal is done against agreed objectives and action plans.

- Employ systems which enable records to be suitably maintained.

The referred framework for appraisal will be that provided by the Office of Human Resources for the Isle of Man Government. It will be annually reviewed and updated to current HR best practice.

PROCEDURE

Cycle of Appraisals

The appraisal cycle will commence on the date of first appointment and there will be interim meetings every three months.

New employees should have a first meeting as part of their induction where their short-term objectives can be set, to manage their period to the confirmation of their appointment after their probationary period.

Meeting 1

The line manager will arrange a meeting with the appraisee to discuss and identify:

- Objectives – what needs to be achieved in the coming period, including the longer term 12 months and for the period to the next meeting.
- Competencies – the required behaviours, skills and knowledge required to achieve those objectives.
- Development plan – what the steps to achieve the objectives look like, including any personal development and training needs.
- What success looks like – a statement which captures what achieving the objective looks like.
- General wellbeing.

Meetings 2 and 3

- As well as regularly checking in with staff, managers will arrange a more formal meeting every 3 months. This will encompass;
- How things are progressing with the short and long term objectives
- Any changes or modifications needed
- What support might be required
- General wellbeing

Meeting 4

The final meeting will cover

- Whether the objectives were met and how they were achieved (reflective process)
- Areas for development
- Personal Growth
- General wellbeing
- The second part of this meeting will then reset to meeting one and the cycle recommences.

CONDUCT OF MEETINGS

Staff must be given adequate notice of their appraisal meeting. These can be diaried ahead but they should be given a reminder in good time of the meeting. If there are any specifics to be talked about the appraisee should be given notice. This is so they have time to prepare.

The meeting should be convened in a comfortable and private space, where interruptions are minimised. Telephones should be diverted, and diary time should be clearly blocked off in Outlook.

Where a scheduled meeting clashes with leave or other commitments, it should be rescheduled in good time.

RECORD KEEPING

A record of the meeting on the correct form should be shared with the appraisee. The form is a 'rolling' one and should be updated throughout the appraisal period. A new one must be started for each new period. Once the content of the form has been agreed it will be kept in the appropriate file area within Laserfiche.

Access to these records will be strictly controlled, in an hierarchical structure with viewing limited to the respective line manager, with overview of the Town Clerk and Deputy Town Clerk, and any Human Resources Function.

Appraisers are responsible for populating the organisational training matrix with any identified training needs, in order these can be managed cost effectively.

PEOPLE QUALITIES

The following three areas are indicative of an engaged and effective team member. They are collectively known as the 'three c's'

Credible

- I have open conversations with my other team members and my manager
- I address issues, taking the initiative in line with my role and responsibilities
- I am professional as to how I go about my work, and am recognised as being good at it

Capable

- I look towards the future, with personal and organisational improvement at the core of that.
- I make considered decisions, based on evidence and professional knowledge
- I am innovative, always looking for improvements.
- I understand when change is required and I contribute positively to it.

Characterful

- I am trusted, and I trust others
- I am motivated, and motivate others
- I show energy, enthusiasm and drive
- I have a positive mindset.

Further descriptors for the various staff grades can be found in the support document People-Qualities - 3Cs Guidance for Staff and Managers

OBJECTIVES

All objectives should ultimately align with the Authority's Strategic Plan. They can be aligned with achieving a project outcome or within personal development where for example the attainment of a skill or qualification.

The process of goal-setting must be collaborative. Both appraiser and appraisee can identify opportunities and there should be agreement on which ones best serve both the organisation and the individual.

Clarity on what achievement of the objective looks like is essential. This should be set out using the SMART Mnemonic; Specific, Measurable, Achievable, Relevant and Time-bound. Expectations, responsibilities and accountability must be clearly communicated. For the avoidance of doubt, these should be documented in the

appraisal and understanding confirmed. However, objectives may change depending on circumstances or priorities.

It is important to recognise and celebrate staff achievements when objectives are met or exceeded.

REFLECTION

Self-reflection is an important part of the development process. By doing so the appraisee can examine strengths and weaknesses and how things might improve. A simple model can be followed;

What happened? A short description of the circumstances.

What did it mean? What went well, or not so well? Why was that? What else might have been done? How could it have gone even better?

Now what? What learning has emerged? What do you need to do to meet any personal development needs or plug a gap in the organisation? What will you do next time in similar circumstances?

FEEDBACK

Giving and receiving feedback is essential in a growth organisation. The Authority seeks to create a Psychologically Safe climate in which it is safe to learn, to have a voice, to contribute and to challenge. Using the SPANS mnemonic can be useful

S Specific – what is the thing that want to give feedback on?

P Proximate – Feedback shouldn't be stored up. It needs to be passed on in a timely manner, so the receiver can recall it and have time to do something about it.

A Agreed – we should give the feedback, but also listen to the response

N Non-judgemental – This isn't personal, its observation and should be kept transactional

S Supportive. Sometimes feedback can be difficult to receive and process and we must take the time and care to support our colleague.

It is important to remember that feedback for things that have gone well are of equal important to ones where there may have been an adverse outcome.

Further Guidance

The following guidance documents are published for the use of all staff. These are available on the Records Management System. Supervisors should make paper copies available to staff under appraisal where they might not have access, e.g. people qualities, Preparing for a meeting – appraisee, attending an appraisal meeting and a copy of the form

- The PDR stages
- People-Qualities - 3Cs Guidance for Staff and Managers
- Performance Development Framework User Guide
- Tip Sheet 1 -Preparing for meeting – appraisee
- Tip Sheet 2 -Preparing for meeting – appraiser
- Tip Sheet 3 – Objectives
- Tip Sheet 4 - Question Bank
- Tip Sheet 5 - Attending an Appraisal Meeting
- Tip Sheet 6 - Facilitating an Appraisal Meeting
- Editable Form for Appraisal

These will be annually reviewed in line with current Isle of Man Government Practice