



DORCHESTER TOWN COUNCIL

STAFF DOCUMENTS SERIES

PERSONAL ACHIEVEMENT AND DEVELOPMENT SCHEME

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DORCHESTER TOWN COUNCIL

PERSONAL ACHIEVEMENT AND DEVELOPMENT SCHEME

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PERSONAL ACHIEVEMENT AND DEVELOPMENT SCHEME

POLICY

1. Introduction

- 1.1 The Council is anxious to encourage staff to continuously develop skills in themselves and those with whom they work. The Personal Achievement and Development Scheme exists to provide employees with the opportunity to discuss, on an annual basis, their job role and performance and development needs, in relation to Council objectives, with their Manager. It is a time to consider the things that are going well, what changes will be needed in the coming year, areas of improvement and any organisational or personal development issues.
- 1.2 The Scheme is central and vital to the management of the performance and the development of individuals who work for the Council at all levels. It provides a focus for continuous improvement, through people, of the services provided by the Council.
- 1.3 The Scheme is not a vehicle for disciplinary or grievance action for which there are separate and well defined procedures.

2. The Aim

- 2.1 The purpose is to identify future action so that individuals can develop within their job role and realistically address any personal aspirations, while agreeing objectives and targets for the coming year. The aim is to review the previous 12 months but with a clear focus on the future and ensuring everyone has the same understanding of the action needed to meet Council objectives.
- 2.2 Discussions will take place annually with a recorded review after 6 months.

3. The Objectives

3.1 For the Employee:-

- to agree standards and targets and review achievements
- to build on strengths and identify areas of development
- to realistically address personal ambitions and aspirations
- to identify and analyse training and development needs
- to provide an action plan for the future

3.2 For the Council:-

- to evaluate and use each individual's strengths more effectively to improve performance
- to involve everyone in achieving personal and Council objectives

4. Responsibilities

- 4.1 The Scheme operates throughout the Council and applies to all levels of staff. The principles of the scheme must be followed, but it is designed to allow for some flexibility.

The Town Clerk supports the scheme and has responsibility to ensure it operates objectively, fairly and consistently throughout the Council. He will ensure that it is firmly embedded as a method of reviewing staff performance and linking development needs to the Council's Performance and Policy Plan. He will conduct reviews on the Deputy Town Clerk.

Reviewing Officers will allocate time on an annual basis to conduct full reviews and also conduct a recorded review of the action plan after 6 months.

Note: The arrangements for reviewing staff based away from 19 North Square may be subject to change following any review of staffing arrangements

Individuals (Postholders) will prepare for the interview by considering the previous 6 or 12 months and what has helped or hindered their performance. They should take an active part in the discussions and preparation of the action plan for the future.

The Town Clerk will act in a 'Grandparenting' role, having sight of all reviews to ensure that reviewers are applying the scheme in a consistent manner. The Administrative Assistant will have a similar responsibility in respect of the Town Hall Keepers. The Chairman and Vice-Chairman of the Council's Resources Panel will be able to see reports on all reviews.

5. Training

- 5.1 All those who are responsible for conducting discussions must attend training on conducting appraisal interviews.
- 5.2 All staff who are to be reviewed should be briefed about the scheme by their reviewers.
- 5.3 Refresher training will be provided as and when necessary.

PERSONAL ACHIEVEMENT AND DEVELOPMENT SCHEME

GUIDELINES ON PROCEDURE

1. Introduction

- 1.1 This document outlines the Personal Achievement and Development Scheme and provides guidelines on its procedures. It should be read thoroughly by all staff conducting or taking part in the scheme before they commence the review process.
- 1.2 The scheme covers **all** staff and aims to ensure that everyone has equal access to training and development opportunities.
- 1.3 The scheme is concerned with the training and development needs of individuals to ensure the most effective use of their abilities. The scheme does not affect an individual's status or pay, but is an opportunity to objectively discuss performance, aspirations and contribution to the Council's Performance and Policy Plan and also to collect people's thoughts and ideas on how things can be improved.

2. Administration

- 2.1 The forms will be issued direct to the reviewer and the member of staff being interviewed.
- 2.2 The reviewer should make arrangements to hold the review discussion giving the member of staff at least 10 days notice.
- 2.3 The reviewer should ensure that the member of staff understands the purpose of the scheme, the format of the discussion and the preparation required before the discussion.
- 2.4 Sections 3.1 and 4 should be completed by all staff. Staff undertaking their first review will not be able to complete section 3.1.
- 2.5 The completed paperwork should be returned to the reviewer two days before the review discussion takes place.
- 2.6 On completion of the discussion, the reviewer and the postholder should agree on a realistic action plan. It is the responsibility of the reviewer to write/type the agreed action plan. Both parties must agree the content before signing the plan.
- 2.7 Both parties keep copies of the action plan. The paperwork retained by the reviewer should be kept secure. It is not to be associated with other personnel records. Access is generally restricted to the reviewer, the Town Clerk and the Chairman and Vice-Chairman of the Personnel Panel.

3 The Discussion

- 3.1 The reviewer should ensure they give adequate notice to the postholder about the date and time of the discussion.

- 3.2 It is important that once a date and time is set both parties are committed to it.
- 3.3 The discussion should take place without interruption and be conducted in an unhurried manner. The atmosphere should be informal.
- 3.4 The length of the discussion will vary according to the complexity of the job role but will probably be between 30 and 60 minutes.
- 3.5 For the review to be effective, both parties must approach it honestly and with commitment.
- 3.6 The review should be seen as one part of what is an ongoing process of discussion between the manager or supervisor and the member of staff on their performance.

4 Desired outcomes of the discussion

- 4.1 The purpose of the discussion is to provide an opportunity for the reviewer and the postholder to discuss the member of staff's performance and identify training and development needs for the forthcoming year. The discussion also provides the opportunity to:
 - a) Clarify roles – what individuals are in post to achieve and how this fits in with the overall aim of the Council.
 - b) Agree standards and targets and review achievements.
 - c) Identify areas of concern either to the reviewer or the postholder and agree plans to alleviate problems.
 - d) Build on strengths and identify areas of development.
 - e) Consider the development of existing skills and the acquisition of new ones.
 - f) Examine aspects of performance which could be enhanced by training and development.
 - g) Realistically address personal ambitions and aspirations.
 - h) Provide an action plan for the future.

5 What the action plan is used for

- 5.1 The action plan is a working document between the reviewer and the member of staff and can include work as well as training and development objectives. Reviews should be held on a regular basis with at least one recorded review after six months, more often if the reviewer or member of staff feel it is necessary.
- 5.2 If the Council's priorities change, it will be necessary to review an individual's objectives to ensure they are still relevant.
- 5.3 The action plan will be used to build up a list of all the training and development needs of staff. The needs are then prioritised and a corporate training plan for the year is drawn up.

6 Standard Form and Variations

- 6.1 The attached document represents the standard form to be used in the process. It may be varied to suit specific needs. This is in recognition that there are various categories of staff and the length and format of the discussion may differ depending on the individual's role in the organisation. The documentation used can be adapted provided that it meets the needs of the Council and meets the principles of the Policy. It is important that reviews are conducted with all staff on at least an annual basis. Reviewers wishing to revise the standard form should do so in consultation with the Deputy Town Clerk.

PERSONAL ACHIEVEMENT AND DEVELOPMENT SCHEME POSTHOLDER'S REVIEW CHECKLIST BEFORE THE DISCUSSION

- Read the Performance and Policy Plan for the coming year.
- Complete the scheme paperwork which you should be given 10 days before your interview.
- Return the paperwork to your reviewer at least 2 days before your interview: Take a copy for yourself.
- Read these guidelines.
- Read through your action and training plans from last year.
- Consider any training and development which could help you do your job more effectively.

DURING YOUR DISCUSSION

- Discuss your progress over the previous 12 months and highlight areas of success and concerns.
- Discuss any training you had over the past 12 months and highlight areas of success and any concerns.
- Discuss any training you had, both formal and informal, and the effect it has had on your work performance.
- Discuss your team's and your own individual performance requirement for the coming year and any major changes in the Performance and Policy Plan. Identify any training or development needs from this.
- Discuss any outstanding items on either the action or training plan.
- Agree and complete a new action plan with your reviewer.
- Book a date for the 6-month review.

DORCHESTER TOWN COUNCIL

PERSONAL ACHIEVEMENT & DEVELOPMENT REVIEW

ANNUAL REVIEW

Name:

Post Title:

Discussion Date:

Rewiew Requiered?:

Reviewer:

Post Title:

1. Introduction

Confirmation of the purpose of the discussion and its relationship with the Council's corporate objectives.

2. Changes Since the Last Review

If this is your first review with the reviewer or your job has changed since the last review, please complete 2.1

2.1 *Job Aim and Key Responsibilities*

2.2 ***Successes since your last review***

2.3 ***Difficulties identified since your last review***

3. Review Previous Years Targets against the Performance and Policy Plan and Setting Individual Targets for the Forthcoming Year.

3.1 *Review of previous year's targets and progress achieved*
(Copy this information from your last review form if it helps)

3.2 Training – Review

Please complete columns 1 to 3 prior to the review discussion. Column 4 will be completed during the discussion to evaluate the success of the training.

1	2	3	4
Training Courses attended over the last 12 months	The reason for attending this course	If possible, give examples of where you have used your new skills in your job	Discussion on further training requirements or future action

4. **New Targets for the Forthcoming Year and Personal Objectives To Help Meet The Targets. These should be prioritised. Highest priority should given to those that must be achieved, the lowest to those that are merely desirable.**

(Use the Council's newest Performance and Policy Plan to establish targets of the next 6/12 months)

1.

2.

3.

4.

5.

6.

DORCHESTER TOWN COUNCIL

PERSONAL ACHIEVEMENT & DEVELOPMENT REVIEW

TRAINING AND DEVELOPMENT NEEDS IDENTIFIED

Name:

Reviewer:

Training and development need identified	Action proposed to meet need	Priority	Target Date	Cost Direct /Indirect	Outcome Measure Expected

Copy to be provided to the Deputy Town Clerk for inclusion in the corporate training plan.

5. Staff Member's Longer Term Career Aspirations

6. Review Summary

6.1 Staff Member's Comments

Staff Member's Signature

Date

6.2 Reviewer's Comments

Reviewer's Signature

Date

DORCHESTER TOWN COUNCIL

PERSONAL ACHIEVEMENT & DEVELOPMENT SCHEME

6 MONTH REVIEW – IF REQUIRED AND AGREED

Name:

Post Title:

Signature:

Date:

Reviewer:

Post Title:

Signature:

Date:

REVIEW OF ANNUAL TARGETS

	Revisited?	Any Further Action		If 'yes' see overleaf
		Yes	No	
1.				
2.				
3.				
4.				
5.				
6.				

FURTHER ACTION & COMMENTS

1.

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2.

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3.

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4.

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5.

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6.

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