

Ludgershall Town Council



Performance Management Policy

1. Introduction

- 1.1. Our Performance Management Policy includes annual reporting processes.
Performance reporting is used to celebrate staff members successes, reflect on past performance, identify training, development, or performance improvement needs, and to motivate staff to perform consistently against their job descriptions and to achieve set during the reporting year.
- 1.2. The performance reporting year runs from 1 June to 31 May, this allows for any newly formed Staffing Committee to be instrumental in objective setting.
- 1.3. This Policy explains the principles that underpin our approach to performance management, it sets out the different roles and responsibilities that staff members, the Town Clerk, the Ludgershall Town Council Chairman and the Staffing Committee have. It provides guidance on how to set strong objectives against which to measure performance.
- 1.4. Within this policy there are options to use such as 360 degree reporting or feedback, which may augment the performance reporting process.
- 1.5. During a reporting year an electronic copy of the objectives and performance reporting will be kept. With hard copies printed and signed at the initial meeting Objective Setting, Check Ins, Mid-Year and Year End Review.
- 1.6. Where performance reporting and objective setting identifies training or development needs these will be addressed through either a training plan, development plan, or where necessary a Performance Improvement Plan. (Please refer to the Performance Improvement Policy).
- 1.7. Where performance is considered exceptional there may be the opportunity for performance related incremental pay increases. However, these will not be awarded

where there is no performance report, or documented evidence to support the pay rise.

- 1.8. This Policy does not form part of the contract of employment. However, it supports the contractual commitment to performance management and reporting as referenced in Ludgershall Town Council employment contracts.
- 1.9. During a newly employed staff members probation period their performance will be managed under relevant probation period policies.
- 1.10. Ludgershall Town Council reserves the right to amend or remove this Policy.
- 1.11. This Policy applies to all staff employed by the Council.

2. Key Principles Underpinning Performance Management

2.1. Performance Managers will be guided by the following principles:

- a All employees will be treated fairly.
- b Performance reporting will be conducted formally with written records kept, and hard copies signed by the Performance Manager and staff member.
- c Discussions in relation to performance will be evidence-based where possible.
- d Performance meetings will be held privately, and confidentiality will be maintained throughout in accordance with the Data Protection Act and UK GDPR.
- e Performance Managers will provide constructive feedback on past performance.
- f Performance Managers will recognise good work.
- g Performance Managers will make sure performance reporting does not exist in a vacuum, it will form the basis of an ongoing discussions regarding performance.
- h The performance manager will set clear objectives for the reporting year ahead.

3. Performance Manager Role

- 3.1. The Performance Manager, be that staff member or Councillor is approved to conduct performance management activity. This role differs to the Line Manager who will be responsible for daily outputs and staff wellbeing. The Staffing Committee may undertake Performance Management or Line Management roles where there is a requirement to do so. For example, when the Town Clerk is absent (for holiday, sickness or due to termination), This responsibility may also fall to the Ludgershall Town Council Chairman.
- 3.2. Positively engaging in performance management can have a big impact of staff motivation. Ludgershall Town Council recognises the importance of having a reporting process that is fit for purpose and where those involved are appropriately trained, or supported by someone with appropriate training.

3.3. It is imperative that performance reporting is conducted in a respectful, transparent, and honest manner. Therefore, Performance Managers agree to.

- a gather evidence to support objective attainment or achievement scores.
- b encourage self-assessment throughout the reporting year.
- c ask open questions where possible, and listen to questions or concerns raised regarding objectives being set.
- d ensure objectives are clear and SMART (Specific, measurable, achievable, relevant, and time-bound).
- e secure 360-degree feedback from work colleagues or Councillors where this supports performance reporting, feedback requests will be submitted with staff knowledge.
- f identify solutions, or interventions to mitigate any issues which arise.
- g identify any training and development needs.
- h provide constructive criticism which is improvement focused.
- i ensure discussions, outcomes and objectives are recorded in writing, and signed where necessary.

4. Staff Member Obligations

4.1. To ensure performance management works staff members are expected to fully engage in performance reporting processes and take an active role. This means:

- a Reviewing objectives and previous reports in good time, and prepare any paperwork before any performance meetings.
- b gathering evidence to where objectives have been met or exceeded.
- c explaining where, or why previous objectives have not been met, and have proposals for how they can be met fully in the future, this may include any training or support requirements.
- d any new objectives are SMART.
- e suggest work colleagues or Councillors whom it may be appropriate to provide 360-degree feedback.
- f take time in advance of the meeting to reflect on any training requests, career aspirations and any points of concern you may wish to raise.

4.2. Staff Members will all have a mandatory objective titled 'The Deal', this objective relates to core behaviours such as timekeeping, presentation, behaviour, and conduct.

4.3. Where a staff member repeatedly fails to engage in performance management processes or unreasonably delays attending scheduled meetings, despite being given reasonable opportunities and support to do so, Ludgershall Town Council reserves the right to proceed with the meeting in their absence. In such cases, any decisions will be based on the available evidence, including written representations if provided. Where the staff member's conduct amounts to misconduct, formal disciplinary procedures may be initiated in accordance with the Council's policies, and the ACAS Code of Practice.

5. Performance Reporting Rhythm

5.1. Ludgershall Town Council operates an annual performance reporting year. The reporting rhythm will be:

- a **June** Review previous year and start new performance year, set objectives for the year ahead. Objectives will be SMART, and a printed version will be signed by the Performance Manager and Staff Member.
- b **September** Performance Manager conducts a check in, reviews progress against objectives, highlight any issues now.
- c **December** Mid-Year check in, Performance Manager considers achievement against objectives to date, staff member provides a short statement of their progress, Performance Manager provides a statement of progress. The report is printed and signed by both parties.
- d **March** Performance Manager conducts a check in and reviews progress against objectives, highlighting any issues now that may lead to an overall performance rating lower than met.
- e **May** Performance Year End Report is completed, appoint an attainment measure for each objective and an overall performance rating. Staff members should look at their objectives and consider what self-assessment rating they believe they have achieved per objective; this should be evidenced where appropriate. A formal discussion with the Performance Manger and staff should then take place with the Performance Manager awarding the final grade. Reports should be printed, signed, and dated by all parties.

5.2. The Objective Setting, Mid-Year Review and Year End documentation will be presented to the Staffing Committee at the next monthly meeting.

5.3. The final reports will be presented to the Staffing Committee as part of the Final Staffing Committee meeting, prior to the new Council year, and potentially new Staffing Committee members. The Staffing Committee will then consider any recommendations for performance related pay increases.

5.4. The relevant documentation for objective setting, Mid-Year and End of Year reporting can be found in the annexes.

6. Objective Setting, Self-Assessment and Achievement Assessments

6.1. Objectives set as part of the performance reporting should be SMART. They should be:

- a **Specific** They should be simple and clearly written.
- b **Measurable** They should include a mechanism by which to judge achievement.
- c **Achievable** They should be attainable, even if they involve some stretching.
- d **Realistic** They should be role relevant and within job capabilities.
- e **Time-bound** They should include timeframes for completion.

6.2. The objective setting template should be used to consider, set, and track objectives.

6.3. Objectives can be achieved at any time throughout the reporting year unless they are based on annual performance.

- 6.4. New, or additional objectives may be set at any time throughout the reporting year. Although careful consideration should be made for objectives spanning reporting years.
- 6.5. Staff will be asked to conduct a self-assessment, in assessing performance against objectives examples should be set out in the following structure:
- a **Situation** Set out the situation within which the objective was met.
 - b **Behaviour** Explain what activity was completed, or product or service was delivered.
 - c **Impact** Set out the impact of the objective, and how it demonstrates performance.
- 6.6. The following Objective Assessment Criteria will be used, and each objective will be assessed using one of the following five ratings:
- a **Unsatisfactory** The objective was not attempted or was approached in a way that significantly fell short of expectations.
 - b **Partially Met** Some progress was made, but the objective was not fully achieved.
 - c **Met** The objective was achieved as expected, meeting all key criteria.
 - d **Well Met** The objective was achieved with a high standard of performance, demonstrating initiative, or added value.
 - e **Exceeded** The objective was surpassed significantly, beyond expectations.
- 6.7. The Performance Manager will review objectives as originally set, the staff's self-assessment and supporting evidence provided, they will assign a rating based on the criteria above and write a short narrative explaining the assessment. The narrative should reference the situation, behaviour, and impact, where relevant, and may include feedback or suggestions for future development.
- 6.8. If a staff member wishes to query, challenge, or appeal an objective rating, they should raise this with their Performance Manager in the first instance. This must be raised within five working days. If unresolved, the matter may be escalated to the Staffing Committee, or staff may opt to follow the Grievance process. Objective assessment ratings, with definitions are at Annex B.

7. Performance Reporting Documentation

- 7.1. The following templates are available to support Performance Managers:
- a **Objective Setting** used at the start of the performance year to set SMART objectives, review previous performance, plan review dates, and identify any initial training or support needs.
 - b **Check In Review Forms** used during planned periodic reviews to track progress against objectives, identify issues, adjust goals, and record support needs, or concerns.

- c **Mid-Year Review** used halfway through the performance year to formally assess progress, invite staff self-assessment using the SBI model, and document any development needs or objective changes.
- d **Year End Review** used at the end of the performance year to complete final ratings for each objective, summarise overall performance, and make recommendations for rewards, recognition, or development plans.
- e **Performance Management Activity Checklist** used to support consistent, fair, and effective performance management throughout the reporting year.

8. Feedback

- 8.1. Feedback may be used to evidence the delivery of an objective. Staff members, and Performance Managers can nominate, or suggest others to approach for feedback.
- 8.2. Staff members, Councillors, or volunteers asked to complete 360-degree feedback must provide fair and honest feedback. Feedback requests may be rejected by those asked.

9. Performance Reporting Next Steps

- 9.1. Where performance reporting identifies a gap in training, competence or conduct interventions should be put in place. This may include coaching, or mentoring options.
- 9.2. Staff members should have access to their current and previous performance reports. Where completed electronically those reports need to be printed at the defined intervals and signed by the Performance Manager and staff member.
- 9.3. If a staff member is unhappy with any part of the performance reporting process, they should raise this in the first instance with their Performance Manager. If the matter remains unresolved following these discussions, then they should refer to our Grievance Policy.

10. Performance Management Retention Period

- 10.1. Performance records, including reviews and objective assessments, will be retained for a period of seven years from the end of the reporting year, in line with best practice for employment documentation.

END

Administration of the Performance Management Policy

A1. Review Date

This policy will be reviewed every two years, or when there are any legislative changes that affect this policy.

A2. Version Control

Version	Approved	Date	Adopted	Date	Comments
V1	Staffing Committee	7 Oct 25	Oct FTC	13 Oct 25	Initial Copy

END

Objective Assessment Ratings – Definitions and Examples

B1. Unsatisfactory

Definition: The objective was not achieved, and performance fell significantly below expectations.

Examples:

- Frequently missed deadlines.
- Did not deliver the required output or service.
- Failed to engage with the objective or show progress.

Indicators: Lack of evidence, repeated reminders, or negative impact on team or service delivery.

B2. Partially Met

Definition: The objective was attempted, and some progress was made, but it was not fully achieved.

Examples:

- Delivered part of the expected output but missed key elements.
- Met the objective inconsistently or with frequent support.
- Deadlines or quality standards were not reliably met.

Indicators: Evidence of effort, but gaps in delivery or impact.

B3. Met

Definition: The objective was achieved as expected, meeting all specific and measurable criteria.

Examples:

- Delivered the required output to the agreed standard.
- Met deadlines and quality expectations.
- Required normal levels of support or oversight.

Indicators: Clear evidence of completion and alignment with SMART criteria.

B4. Well Met

Definition: The objective was consistently achieved to a high standard, without the need for reminders or intervention.

Examples:

- Delivered on time, within budget, and to scope.
- Demonstrated initiative and ownership.
- Positive feedback from stakeholders or colleagues.

Indicators: High reliability, proactive behaviour, and strong alignment with role expectations.

B5. Exceeded

Definition: The objective was surpassed significantly, with outcomes that added exceptional value.

Examples:

- Delivered ahead of schedule or with enhanced quality.
- Introduced improvements or innovations beyond the original scope.
- Demonstrated leadership or influence in achieving the objective.

Indicators: Evidence of impact beyond expectations, such as cost savings, service improvements, or stakeholder recognition.

END