

## Staff Handbook

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### Revision 1 – Approved by PCC on 14 November 2023

Policy 2 – Recruitment – Identifying a vacancy: In the first sentence adding “and approve the recruitment including ...”

Policy 2 – Recruitment process: Widening the scope of the advertising to include social media, etc. “A vacancy should be advertised in an appropriate manner which could include the Diocesan website, the Governments Find a Job website, church website, news bulletins, and social media.”

Policy 3 – Overtime: Adding details of the process for paying overtime. “Overtime claims must be signed by the employee and manager and submitted by 9th of the month following the period for which the overtime is claimed. The amount owed will be added to the salary payment in that following month.”

Policy 12: Replacing previous Diversity policy with “Diversity, Equality and Inclusion” based on ACAS policy,

Policy 15 Replacing Internet Policy with “Social Networking to the internet Policy” to take account of changes in technology and media.

## 1. Introduction

The following policies and procedures relate to the operation of All Saints Church Wokingham and The Cornerstone, Wokingham.

The Parochial Church Council (“PCC”) reserve the right to amend, suspend or withdraw any part of any of these policies at their absolute discretion.

## 2. Recruitment Procedure

### Identifying a vacancy

Before any recruitment activity takes place, the PCC must be made aware of the reasons for the vacancy, and approve the recruitment including the hours required and the budget for the post, including salary, employers NIC, employers pension contribution and any other associated costs.

The purpose and duties of the role must be clearly defined and documented, and a person specification drawn, identifying the skills and qualifications that are essential for the role. Where it can be justified, it is possible to state that a role must be held by a Christian. Where that cannot be justified, it is possible to state in the person specification or advertisement that the job holder must be comfortable working within our Christian ethos, which would not require them to be a Christian.

The recruitment process should follow the national Church safeguarding Safer Recruitment guidance. The Acas guide to recruiting also provides useful guidance including advertising, interviews and discrimination.

### Recruitment objectives

Every effort must be made to ensure that all recruitment and selection activities are conducted in a manner that is fair, effective and promotes equality of opportunity. Documentation relating to applicants must be treated with the utmost confidentiality and in accordance to the Data Protection Act (DPA). Applicants will have the right to feedback and to access any documentation held on them in accordance with the DPA.

### Recruitment process

Once approved by PCC, the recruiter(s) must determine the most appropriate method of soliciting applicants, review applications, invite short-listed candidates for interview, hold interviews, and notify both successful and unsuccessful candidates of the outcome of their applications.

A vacancy should be advertised in an appropriate manner which could include the Diocesan website, the Governments Find a Job website, church website, news bulletins, and social media. The role should be advertised for a minimum of two weeks.

The selection process should be transparent to the candidate, confidential, equitable to all candidates and free from conflict of interest. The people who conduct the shortlisting should ideally also do the interviewing. The interviewers should agree the format of the interview in advance, with pre-agreed competency-based questions. Notes should be taken during the interview so that the candidates can be scored against the criteria which have been set for that role.

Any recruitment paperwork should be retained only for as long as it is needed and should be kept confidential.

### Conditional offer of employment

Any offer of employment must be conditional on:

- Receipt of references that are satisfactory for the role (detailed references are especially important if the individual is working with children or vulnerable adults);
- Evidence of right to work in the UK (e.g. work permit or passport);
- Establish whether an individual is fit for the role or if adjustments may be necessary;
- Evidence of qualifications essential to the role
- Disclosure and Barring Service check and confidential declaration (if required) (see the Safeguarding pages on the Diocesan website)

Contract of employment

All Saints template for the Statement of Main Terms and Conditions of Employment should be used as the basis of all contracts of employment.

### 3. Pay & Overtime

Salaries will be paid into the employee's nominated bank account by the end of each month.

#### Overtime

Employees who work in excess of their contracted hours may be paid the flat hourly rate for each complete additional hour or half hour worked in excess of the contracted hours. Such payments will only be made if the additional hours were agreed in advance by the employee's manager. Overtime claims must be signed by the employee and manager and submitted by 9<sup>th</sup> of the month following the period for which the overtime is claimed. The amount owed will be added to the salary payment in that following month.

Employees will not be required to work hours which exceed an average of 48 hours per week.

#### Salary Reviews

Salary increases are awarded at the PCC's discretion based on performance. There is no guarantee or automatic cost of living element. Salary increases will not be awarded to employees whose performance is unsatisfactory.

### 4. Performance Management (Objective Setting and Appraisal)

Performance management is an on-going cycle of setting objectives or goals, informal reviews and formal annual appraisal (performance review). By providing clearly defined individual objectives that are aligned to those of the Parish and The Cornerstone, the manager enables the employee to see how their achievements contribute to the parish's success. At all times, employees should be clear about what is expected of them.

Any concerns on either side should be raised as and when they arise, rather than waiting for the formal annual review.

Details of the process can be found in Appendix 1.

#### Training and Monitoring

The PCC is responsible for ensuring that the appraisal process is followed in a timely manner and that line managers and employees receive training on the process where necessary.

### 5. Expenses

Employees will be reimbursed for actual and reasonable expenses necessarily incurred in the course of their work. Receipts should be provided wherever possible. The underlying principle is that there should be no significant gain nor loss to the employee. Employees must act responsibly and in their employer's best interests at all times when incurring and claiming business expense.

Employees who travel to work by car may use the church car park in Norreys Avenue, but a space cannot be guaranteed. If no space is available, the cost of parking can be reclaimed as a business expense. Disabled employees may use the disabled space outside the Cornerstone.

#### Claimable expenses

Wherever possible, expenses should be agreed in advance. Travel by car will be reimbursed at the HMRC mileage rate at the time of travel, but not exceeding the rate for a 2000 cc engine car. Travel to and from work is not reimbursable.

## Process for claiming expenses

Employees should submit a claim to their line manager for approval and forwarding to finance for payment. All expense claims will be reviewed independently at least once per year by two members of the PCC.

## 6. Holiday

### Annual Holiday entitlement

Holiday entitlement is stated in the employee's contract of employment. The holiday year runs from 1 January to 31 December. In addition, employees are entitled to Bank Holidays when these fall on a normal working day.

### Approving Annual Holiday

Employees must obtain the prior approval of their manager for their holiday dates. Wherever possible the manager will try to accommodate employee requests, but all requests will be considered in the context of workload and operational needs. If an employee takes holiday without approval, they may be subject to disciplinary action.

### Holiday Accrual Formula on joining or leaving employment

Holiday is earned on a pro-rata basis for each complete calendar month worked in the current calendar year. The entitlement will be calculated as follows:

- Annual holiday entitlement
- Multiplied by the number of complete calendar months worked in the year
- Divided by twelve (months in holiday year)

If an employee leaves with holiday entitlement to their credit, the appropriate amount of salary is added to his/her final salary settlement. For a terminating employee any "taken" but not yet "accrued" holiday i.e. a negative holiday balance, will normally be withheld from the employee's final pay cheque.

### Holiday for Part Time Employees

Holiday entitlement for part time employees is calculated on a pro-rata basis. Employees whose normal working day falls on a Bank Holiday receive the day off. Those who would not normally work on a Bank Holiday do not receive an additional day off in lieu.

### Bank Holidays

The following eight days are recognised as Bank Holidays: New Year's Day; Good Friday; Easter Monday; May Day; Spring Bank Holiday; August Public Holiday; Christmas Day; Boxing Day. If a bank holiday occurs during an employee's vacation period, they will be entitled to another day off with pay if they would normally work on that day of the week.

### Carrying Forward holiday

Employees may carry up to 5 days holiday over to the next year. For part-time employees, the number of hours in one normal working week may be carried forward.

## 7. Sickness Absence

### Procedure

Employees must notify their manager on the morning of the first day of absence, as soon as reasonably possible, with the reason for the absence, likely duration and expected return to work date. While on sick leave the employee must keep their manager informed of their likely return to work date and any urgent business that is outstanding.

### Certification

On the 8th day of absence (including weekends and public holidays) the employee must provide a doctor's "Fit Note". Employees will be entitled to Statutory Sick Pay in accordance with the prevailing legislation at the time. The maximum entitlement to statutory sick pay is 28 weeks.

The PCC reserves the right to seek independent medical opinion, subject to the provisions of the Access to Medical Reports Act.

### Managers Responsibilities

The employee's manager must:

- Check doctor's medical certificate for dates, reason for illness and doctor's stamp
- Record all absences on Inland Revenue form SSP2,
- Monitor dates so that the necessary pay adjustments can be made.
- On the employee's return to work, ensure that the employee is fit to work

### Medical Appointments

Where possible employees should attend medical appointments outside normal working hours. If appointments are required during working hours the employee must gain approval from their manager in advance of taking the time off.

### Disciplinary Action relating to absence

Disciplinary action may be considered in accordance with the Disciplinary Policy in the following situations:

- Where there is significant evidence of abuse of the Sickness Absence Policy
- Where this abuse creates a particular ongoing operational difficulty
- Where an absence pattern develops which is of concern to the PCC

Before taking disciplinary action, and throughout the disciplinary process, the employee will be afforded every opportunity to discuss the situation.

## 8. Maternity, Paternity, Adoption, Family and Parental Bereavement Leave

Eligible employees will be entitled to maternity, paternity, adoption, family and parental bereavement leave in accordance with the legislation prevailing at the time. Acas has advice on these topics.

## 9. Grievance Policy

The PCC reserves the right to amend, suspend or withdraw any part of this policy at its absolute discretion. This policy is not contractually binding on the employer.

From time to time employees may have concerns on a range of different issues relating to their employment. Employees are encouraged to resolve any issues informally, but if this is unsuccessful, the employee may raise the issue as a formal grievance.

The objective is to reach a fair and prompt settlement of formal grievances to the satisfaction of all concerned. This grievance procedure provides mechanism for dealing with such grievances.

Every employee is entitled to use the Grievance Procedure to raise formally any employment related issue other than appeals arising from disciplinary action. At any grievance hearing, the employee has the right to be accompanied or supported by another willing employee (not a relative) if he/she wishes. Alternatively, an employee also has the right to be accompanied at the hearing by a trade union official if he/she wishes.

### Grievance Procedure - Stage 1

Any employee having a grievance should, in the first instance, raise it with their immediate manager who shall consider the grievance fully and attempt to resolve the matter by replying in writing within two working days, and in any case no later than five working days of the matter being referred.

## Grievance Procedure - Stage 2

If the employee is not satisfied with the reply, he/she may escalate the matter to the Standing Committee who shall notify the PCC and reply to the employee in writing within five [5] working days or other period agreed between the manager and the employee. The manager will make comprehensive notes of all discussions related to the grievance.

When the grievance has been resolved, copies of any documentation should be placed in confidence on the employee's Personnel file. These records will be kept for a period of five years before being destroyed as confidential waste.

## 10. Disciplinary Policy

From time to time there are those who fail to achieve the required standards of behaviour, conduct, performance and ethics expected of them or who breach procedures. This policy deals with those situations. It does not form part of the contract of employment.

The PCC reserves the right to vary its response in relation to disciplinary matters in appropriate circumstances, including giving a written or final warning immediately in cases which fall short of gross misconduct.

### Principles of Disciplinary Policy

The Disciplinary Policy is based on certain principles of fairness, namely

1. The employee's case will be fully investigated before any disciplinary action (excluding suspension) is taken.
2. At any formal disciplinary hearing or appeal, the employee has the right to be accompanied or supported by another employee (not a relative or legal representative) if he/she wishes. Alternatively, an employee also has the right to be accompanied at the hearing by a trade union official if he/she wishes.
3. The employee will be advised of the nature of the disciplinary case brought against him/her at every stage of the procedure and will be given an opportunity to state his/her case before a decision is made.
4. The employee will be provided with written confirmation of any action resulting from the disciplinary procedure. This will remain on the employee's file normally for a period of 6 to 12 months.

At each stage of the disciplinary procedure, the employee has the right to appeal against the decision taken, and should be told the name of the person to whom any appeal should be made; this should be someone who has not been involved in the case. The appeal procedure is set out below.

### Informal Discussion Prior to Disciplinary Action

If an employee's standard of work or behaviour falls below an acceptable level, the manager will informally make them aware that this is unacceptable and point out how it must be improved. This shall be seen as a counselling session and the manager will place a record of the incident on the employee's file. This record will be used as evidence and /or reference in the formal disciplinary procedure. An informal discussion may include the issue of a verbal warning.

### Disciplinary Procedure

The various stages of the Disciplinary Procedure are not necessarily cumulative, and the PCC reserves the right to miss out any of the stages bearing in mind the circumstances involved.

#### Disciplinary Stage 1: Written Warning

Where the employee's conduct and/or performance continues to be unacceptable following informal discussion or if the infringement is of a more serious nature, a written warning will be issued to the employee by the manager. The manager should give details of the warning, the improvement or change in behaviour required, the timescale allowed for this and the right of appeal. He/she will also be advised that a final written warning may be considered if there is no sustained satisfactory improvement or change. A copy of this warning will be kept on the employee's file but should be disregarded for disciplinary purposes after twelve months or upon evaluation of each individual case.

## Disciplinary Stage 2: Final Written Warning

If the employee's conduct and/or performance is still unsatisfactory, or a breach of standards or policy is deemed so serious, his/her Manager will issue a final written warning. The Manager will give details of the complaint, warn the employee that failure to improve or modify behaviour will lead to dismissal or to some other action short of dismissal and refer to the right of appeal. A copy of this warning will be kept on the employees' file but should be disregarded for disciplinary purposes after twelve months or upon evaluation of each case.

## Disciplinary Stage 3: Dismissal

Dismissals will normally result if an employee's performance and/or conduct remain unsatisfactory after the procedure above has been followed or where gross misconduct has occurred. The decision to dismiss should be taken only following a disciplinary meeting constituted in accordance with the principles outlined above. The employee will be provided with written confirmation of the decision, the date on which the contract between the parties will terminate, the appropriate period of notice (or pay in lieu of notice), the employees obligations on departure and the appeals procedure. In the case of Gross Misconduct, termination will be without notice.

## Gross Misconduct

Certain situations merit immediate dismissal without previous warning; this is viewed as gross misconduct and will normally result in summary dismissal (dismissal without notice). Where an employee is dismissed for gross misconduct, no pay in lieu of notice will be paid. The following is a guideline of instances that may merit summary dismissal.

- Theft, fraud and deliberate falsification of records
- Physical violence
- Serious bullying and harassment
- Sexual, racial, religious harassment
- Deliberate damage to property
- Serious insubordination
- Wilful violations or gross negligence of safety, security and child protection procedures or rules
- Misuse or unauthorised disclosure of confidential information
- Serious incapability whilst on duty brought on by alcohol or illegal drugs
- Bringing the Church or the Cornerstone into disrepute
- Serious breach of confidence
- Destroying the PCC's trust in the employee

This list is illustrative only and is not intended to be exhaustive. Offences of a similar magnitude will be dealt with in the same way. The seriousness of the offence will be judged in the context of the employee's role.

## Suspension

In circumstances where The Committee needs time to investigate the employee's particular case, an employee may be suspended from his/her duties and asked to stay at home and be available should they need to be contacted. During suspension from work, the employee will normally remain on full pay. The anticipated duration of the suspension will be stated at the time and will be confirmed in writing, but will normally not exceed 5 working days.

## Appeals Procedure

Where any decision has been made as a result of a disciplinary process, the employee has the right of appeal. An appeal against a disciplinary decision should be sent, in writing within five working days of the disciplinary decision being made. The disciplinary letter will clearly state to whom an employee should appeal. The appropriate person will hear the appeals (wherever possible, no person previously involved in the Disciplinary process should form part of the Appeals process).

At the appeal the employee will be given the opportunity to state his/her case. Any disciplinary penalty previously imposed will be reviewed but it would not normally be increased. The employee should be informed of the outcome of the appeal and the reasons for the decision as soon as it is possible, and this should be confirmed in writing. This decision will constitute the final stage of the appeals procedure.

## Criminal Offences

Criminal offences outside work will not automatically be treated as reason for dismissal. However, those which have a bearing on the nature of the job may constitute grounds for dismissal (e.g. crimes which prohibit the employee from working with children and young people). In such cases, the normal steps in the disciplinary procedure must be followed.

## 11. Whistleblowing

Whistleblowing is the term used when an employee passes on information concerning wrongdoing. The wrongdoing will typically (although not necessarily) be something they have witnessed at work. The PCC will observe the guidance outlined in the Government's website on Whistleblowing .

## 12. Equality, diversity and inclusion policy

All Saints PCC is committed to encouraging equality, diversity and inclusion among our workforce, and eliminating unlawful discrimination.

The aim is for our workforce to be truly representative of all sections of society and our community, and for each employee to feel respected and able to give their best.

The PCC - in providing services and facilities - is also committed to addressing issues of unlawful discrimination of its congregational members, volunteers, customers, members of the local community or the wider public.

### This policy's purpose is to:

1. Provide equality, fairness and respect for all in our employment, whether temporary, part-time or full-time
2. Not unlawfully discriminate because of the Equality Act 2010 protected characteristics of:
  - age
  - disability
  - gender reassignment
  - marriage and civil partnership
  - pregnancy and maternity
  - race (including colour, nationality, and ethnic or national origin)
  - religion or belief
  - sex
  - sexual orientation
3. Oppose and avoid all forms of unlawful discrimination. This includes in:
  - pay and benefits
  - terms and conditions of employment
  - dealing with grievances and discipline
  - dismissal
  - redundancy
  - leave for parents
  - requests for flexible working
  - selection for employment, promotion, training or other developmental opportunities

### The PCC commits to:

1. Encourage equality, diversity and inclusion in the workplace as they are good practice and make business sense
2. Create a working environment free of bullying, harassment, victimisation and unlawful discrimination, promoting dignity and respect for all, and where individual differences and the contributions of all staff are

recognised and valued.

This commitment includes training managers and all other employees about their rights and responsibilities under the equality, diversity and inclusion policy. Responsibilities include staff conducting themselves to help the organisation provide equal opportunities in employment, and prevent bullying, harassment, victimisation and unlawful discrimination.

All staff should understand they, as well as their employer, can be held liable for acts of bullying, harassment, victimisation and unlawful discrimination, in the course of their employment, against fellow employees, customers, suppliers and the public

3. Take seriously complaints of bullying, harassment, victimisation and unlawful discrimination by fellow employees, volunteers, visitors, customers, suppliers, the public and any others in the course of the organisation's work activities.

Such acts will be dealt with as misconduct under the organisation's grievance and/or disciplinary procedures, and appropriate action will be taken. Particularly serious complaints could amount to gross misconduct and lead to dismissal without notice.

Further, sexual harassment may amount to both an employment rights matter and a criminal matter, such as in sexual assault allegations. In addition, harassment under the Protection from Harassment Act 1997 – which is not limited to circumstances where harassment relates to a protected characteristic – is a criminal offence. Managers and employees of All Saints and The Cornerstone are also referred to the All Saints Safeguarding Policy, including the Diocese's Safer Recruitment and People Management Guidance.

4. Make opportunities for training, development and progress available to all staff, who will be helped and encouraged to develop their full potential, so their talents and resources can be fully utilised to maximise the efficiency of the organisation.

5. Make decisions concerning staff being based on merit (apart from in any necessary and limited exemptions and exceptions allowed under the Equality Act).

6. Review employment practices and procedures when necessary to ensure fairness, and also update them and the policy to take account of changes in the law.

7. Monitor the make-up of the workforce regarding information such as age, sex, ethnic background, sexual orientation, religion or belief, and disability in encouraging equality, diversity and inclusion, and in meeting the aims and commitments set out in the equality, diversity and inclusion policy.

Monitoring will also include assessing how the equality, diversity and inclusion policy, and any supporting action plan, are working in practice, reviewing them annually, and considering and taking action to address any issues.

### **Agreement to follow this policy**

The equality, diversity and inclusion policy is fully supported by the PCC and those in positions of management at All Saints Church and The Cornerstone.

## **13. Harassment and Bullying**

Harassment at work is unlawful. Harassment is unwanted conduct, which takes place with the purpose or effect either of violating a person's dignity or creating a hostile working environment.

Bullying is defined as any unsolicited to unwelcome act that humiliates or undermines the individual involved. No form of bullying will be condoned at work, or outside work if it has a bearing on the working relationship. Examples of bullying behaviour include, but are not limited to:

- Derogatory remarks
- Insensitive jokes or pranks
- Insulting or aggressive behaviour
- Ignoring or excluding an individual

- Repeated public criticism

## 14. Data Protection

See the All Saints Privacy Policy which can be found at <https://www.allsaintswokingham.org.uk/wp-content/uploads/2022/12/All-Ss-Data-privacy-notice-2022.pdf>

## 15. Internet and social networking Policy

Computer assets are provided to employees primarily for business purposes. While reasonable personal usage is allowed this specifically excludes any usage which may contravene existing legislation (e.g. Data Protection). Excessive personal use of the Internet during working hours and/or the downloading, retrieval or storage of inappropriate or offensive material is expressly prohibited.

Messages for personal gain or solicitation, obscene graphics or documents, threatening or harassing messages, and jokes or text, which demean members of minority groups and/or specific individuals are expressly prohibited.

Staff who maintain personal websites or blogs or use social networking sites such as Facebook or Twitter, and who wish to mention or refer to the church or The Cornerstone either by name or in any other way, should comply with the guidelines listed below.

Whilst maintaining such sites and blogs, staff must:

- ensure that any reference to the church or The Cornerstone is not defamatory, offensive, obscene, untrue or malicious
- not include or write anything which may bring the church or The Cornerstone into disrepute.
- not disclose any confidential information about the church or The Cornerstone or its members or customers.
- not breach the organisation's harassment and bullying policies, or any other of its policies.
- ensure that they at all times act in a professional manner and uphold the reputation and ethos of the organisation.

Staff may only access personal websites, blogs or social networking sites during break times. This applies both to staff using workplace computers and mobile phones to access such sites.

Breach of this policy statement will be considered to be misconduct and will be dealt with within the framework of the organisation's disciplinary procedure. In a serious case it could result in an employee being dismissed for gross misconduct.

## 16. Copyright

Material can only be copied, adapted, displayed and published to the extent permitted by the copyright owner. Care should also be taken to ensure that by using any material, the PCC does not become committed to the copyright holder, for example being required to make a payment for each copy made. Each worker, including volunteers, is responsible for maintaining copyright compliance for documents or software, made available and accessed on the Internet.

Employees must comply with the copyrights of software posted to the Internet. Employees must not copy, install, or distribute software in a manner which violates the license agreement for that software or the copyright laws.

## 17. Use of Employer's Resources

Resources and equipment such as telephone, computer, photocopier, etc are provided for business use and should, not generally be used by employees for personal purposes. Occasional, limited use of these is permitted but should be kept to a minimum. Excessive or improper use of such equipment and resources may lead to disciplinary action.

## 18. Drugs & Alcohol Policy

The PCC is committed to providing a safe and healthy working environment for employees and users of the Church and The Cornerstone. The abuse of drugs, alcohol or illegal substances is not condoned by the PCC. An employee who has this type of problem and seeks help from their manager will receive understanding and supportive treatment. If such help is not sought, the employee may be approached directly about the problem with a view to resolving it.

Continued abuse causing any deterioration in job performance or failure to take appropriate corrective action may result in disciplinary action. Addiction to alcohol or drugs will not excuse behaviour which would otherwise be a disciplinary offence.

Incapability through alcohol may constitute an act of gross misconduct, resulting in summary dismissal.

Any employee who deals in illegal drugs, or who is under the influence of illegal drugs whilst at work will be considered to be committing an act of gross misconduct, rendering them liable to summary dismissal.

## 19. End of Employment Relationship

### Exit Interview

An exit interview should include:

- Identification of the reasons for leaving, if the employee is willing to provide these;
- Discussion with the employee about the proper handover of their duties;
- Making arrangements for the employee to return any equipment or property;
- Confirmation that the employee is aware of the arrangements that have been made for their departure, including the date on which any outstanding payments will be made to them.

On the employee's last day all security passes, passwords and other security measures must be disabled.

### Resignation

An employee who wishes to leave should do so by submitting their resignation in writing to their manager. This should be acknowledged with a letter which should include:

- details of the exit procedure, including work during their notice period;
- the notice period, the date employment ends and the last working day date;
- holiday pay and when they will receive their final pay;
- information about where to find information regarding pensions
- procedures for the return of PCC property;
- handover arrangements.

Manager and employee should then agree when colleagues will be told and by whom.

If the contract of employment makes provision for payment in lieu of notice (PILON), the employee may be told in writing that they are not required to work their notice. PILON is subject to the normal tax and NIC deductions.

### Retirement

The leaving process is the same as for resignation. As a minimum, the employee should give the amount of notice stated in their contract, but it is beneficial to both parties if more notice is given.

There should be no disparity between retiring employees and other staff leaving the organisation which could amount to age discrimination against younger workers.

### References

There is no obligation to provide a reference, but if one is provided, it must be fair and accurate and can only be issued after approval by the Rector or a Church Warden. Advice on providing references is available from Acas.

## 20. Appendix 1: Objective Setting and Appraisal Process

Objective setting and appraisal is a continuous cycle which can be summarised in the following steps.

### Step 1 - Set work objectives

These objectives (also known as goals) must tie in with the parish vision and the duties outlined in the employee's job description. Objectives should be 'SMART':

- Specific - should state a desired outcome - a standard. What does the employee need to achieve?
- Measurable - how will the manager and employee know when an objective has been achieved? As well as the standard, what is the quantity of work required?
- Achievable - is the objective something the employee is capable of achieving, but also challenging?
- Relevant - do objectives relate to those of the team, the parish and The Cornerstone?
- Time-bound - when do the objectives need to be achieved? Agree a deadline.

### Step 2 - Agree how objectives should be achieved

While objectives are the ends to be achieved, the necessary skills, knowledge, personal attributes and conduct are the means by which they are achieved. They can also be called competences or behaviours.

- Agree the competences needed for the job. The employee needs to understand what is expected of them, including how they should conduct themselves.
- Competences are often linked to development needs, so any training the employee may need to develop their skills and improve their conduct, should be considered and agreed with the employee.
- An example of competences might be "teamwork", which might be achieved by communicating with the team.

The employee should be given a written copy of the objectives that have been agreed.

### Step 3 – Give feedback throughout the year

Informal feedback throughout the year is important to ensure that performance remains on track. Ideally this should happen in regular monthly one-to-one meetings between manager and employee, and on an ad hoc basis as required. Issues can then be addressed at an early stage before they become serious problems. There should be no surprises at the annual appraisal meeting.

### Step 4 – Prepare for the appraisal

In preparation for the appraisal meeting the manager should:

- Consider how well the employee has met the objectives set at the beginning the year, with examples of when the objectives have been met particularly well and invite the employee to do the same.
- Set a date, time and place for the appraisal and let the employee know well in advance. Make sure that you will not be disturbed during the meeting.
- Invite the employee to prepare for the meeting by reflecting on his/her performance over the last year.
- Complete the manager's part of the appraisal form, including the goals and using the rating scale shown there.

Poor performance may indicate a training need. This should be included in the plan for the coming year.

### Step 5 - Hold the appraisal meeting

During the appraisal meeting the manager should:

- Make clear the purpose of the meeting and how it will run.
- Go through the first objective and open up a two-way discussion, focusing first on what the employee has done well and listening to the employee.
- Highlight positive - and, where necessary, negative - aspects of performance. Performance ratings should be based on hard evidence of specific examples. Keep the discussion factual.
- Do this for each of the objectives.
- Agree and document development needs and target dates, any actions concerning objectives, including any new objectives, and target dates over the next 12 months.
- Give the employee the opportunity to write comments on the form.
- The completed Appraisal Form and action plan should be signed by the employee and the manager. One copy should be kept by the appraiser, one by the employee, and one should go on the employee's personal file.

Any issues affecting the employee's work should be dealt with then there and then if possible.

**EMPLOYEE PERFORMANCE APPRAISAL FORM**

Employee Name		
Job Title		
Period of Review		
Name of Reviewer		
Position of Reviewer		
<b>Instructions</b>		
<p>The Reviewer should assess all aspects of the employee’s performance during the review period on the following scale:</p> <ul style="list-style-type: none"> <li>Outstanding – Performance consistently exceeds expectations</li> <li>Excellent – Meets and often exceeds expectations</li> <li>Satisfactory – Meets all expectations</li> <li>Needs improvement– Meets most expectations but some areas of weakness</li> <li>Unsatisfactory – Frequently fails to meet expectations</li> </ul>		
<b>Objective being reviewed</b>	<b>Reviewer’s comments</b>	<b>Rating</b>
<b>Overall assessment</b>		
<b>Employees Comments</b>		
<b>Objectives for next year</b>	<b>To be agreed by employee and reviewer</b>	<b>Dates to be achieved</b>

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Reviewer's Signature	Date
Employee's Signature I confirm that I have read this appraisal and had the opportunity to discuss it with my manager	Date