Employee’s Name:

Title:

Supervisor:

Review Period:

Review Type: 90 Day [ ]  Annual [ ]



Annual Performance Review

The Roman Catholic Diocese of Charleston’s performance appraisal process has three objectives:

* To assess and measure individual performance on the job.
* To identify areas of opportunity.
* To provide a catalyst for open and constructive communication.

Optimal job performance requires a clear understanding of what work is to be performed, desired outcomes, and how well the work is completed. The performance appraisal process ensures that employee and manager expectations are aligned. Through this process, the employee and manager can find opportunities to work together to improve job performance and grow professionally within the organization.

The performance appraisal includes three components:

* Employee Competencies

Focus on measuring performance related to competencies important for successful job performance. This section asks for an evaluation of each competency by your manager.

* Performance Summary

Asks managers to summarize performance including key strengths and areas of opportunity.

* Performance Development Plan and Goal Setting

Is used by you and your manager to establish developmental areas of growth or educational goals for the upcoming year.

How to Use this Form:

* This form is designed to be completed electronically or printed. Add your Parish/School logo to the top of this form by clicking on the box in the top left hand corner. You can also type the name by clicking the grey space above the box. Click on the checkbox of your choice for the numerical ratings. You may type in the grey boxes in the comments and brief explanation sections. The area will automatically expand as you type.
* The brief explanation sections are optional. If you choose to complete this section it is recommended that specific examples are used to illustrate why a particular rating was given.
* The overall rating should be an average of the scores given for the individual questions.

Job Definition

* Attach a current position description (if applicable, make note of any significant changes since last year’s performance review)

*Performance Competencies*

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| 5 – Exceptional: | Performance is consistently superior and significantly exceeds position requirements. | 5 – Exceptional  | 4 – Highly Effective | 3 – Proficient  | 2 – Inconsistent  | 1 – Unsatisfactory  | N/A – New/Not Applicable |
| 4 – Highly Effective | Performance frequently exceeds position requirements. |  |  |  |  |  |  |
| 3 – Proficient | Performance consistently meets position requirements. |  |  |  |  |  |  |
| 2 – Inconsistent  | Performance meets some, but not all position requirements. |  |  |  |  |  |  |
| 1 – Unsatisfactory  | Performance consistently fails to meet minimum position requirements; employee lacks skills required or fails to utilize necessary skills. |  |  |  |  |  |  |
| N/A – New/Not Applicable | Employee has not been in position long enough to have demonstrated the essential elements of the position and will be reviewed at a later agreed upon date. |  |  |  |  |  |  |
| Job Knowledge:  | 5 | 4 | 3 | 2 | 1 | N/A |
| 1. Understands position duties and responsibilities and can apply knowledge to practical situations |[ ] [ ] [ ] [ ] [ ] [ ]
| 2. Keeps current with new developments in the field |[ ] [ ] [ ] [ ] [ ] [ ]
| 3. Consistent, accurate and thorough in their work |[ ] [ ] [ ] [ ] [ ] [ ]
| 4. Demonstrates creativity and skill in a variety of situations |[ ] [ ] [ ] [ ] [ ] [ ]
|  *Brief explanation:*  |
| Communication: | 5 | 4 | 3 | 2 | 1 | N/A |
| 5. Effectively presents information in a way that is clear, concise, and understandable in both written and verbal form |[ ] [ ] [ ] [ ] [ ] [ ]
| 6. Demonstrates strong listening skills |[ ] [ ] [ ] [ ] [ ] [ ]
| 7. Interacts professionally and receives constructive feedback appropriately |[ ] [ ] [ ] [ ] [ ] [ ]
|  *Brief explanation:*  |
| Decision Making/Judgment: | 5 | 4 | 3 | 2 | 1 | N/A |
| 8. Makes recommendations and implements decisions effectively and follows up to ensure positive results. |[ ] [ ] [ ] [ ] [ ] [ ]
| 9. Supports recommendations with factual information. |[ ] [ ] [ ] [ ] [ ] [ ]
| 10. Shows consideration for resources, constraints and organizational goals |[ ] [ ] [ ] [ ] [ ] [ ]
| 11. Prioritizes tasks thoughtfully and effectively |[ ] [ ] [ ] [ ] [ ] [ ]
|  *Brief explanation:*  |
| Service to External Groups (Parishes, Schools, Committees, Parishioners): | 5 | 4 | 3 | 2 | 1 | N/A |
| 12. Represents their department in a positive manner by understanding and anticipating the needs of others |[ ] [ ] [ ] [ ] [ ] [ ]
|  *Brief explanation:*  |
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| Results Driven: | 5 | 4 | 3 | 2 | 1 | N/A |
| 13. Meets established targets and achieves results |[ ] [ ] [ ] [ ] [ ] [ ]
| 14. Meets individual, team, and organization related objectives by coordinating with others and setting challenging goals |[ ] [ ] [ ] [ ] [ ] [ ]
|  *Brief explanation:*  |
| Adaptability/Flexibility: | 5 | 4 | 3 | 2 | 1 | N/A |
| 15. Adapts to change quickly and independently and is open to new ideas |[ ] [ ] [ ] [ ] [ ] [ ]
| 16. Attempts new approaches and suggests improvements |[ ] [ ] [ ] [ ] [ ] [ ]
| 17. Uses mistakes as a learning tool and a catalyst for improvement |[ ] [ ] [ ] [ ] [ ] [ ]
|  *Brief explanation:*  |
| Teamwork: | 5 | 4 | 3 | 2 | 1 | N/A |
| 18. Contributes to team projects and works effectively within a team |[ ] [ ] [ ] [ ] [ ] [ ]
| 19. Attempts to maintain and build team environment by supporting others when needed both within and across departments |[ ] [ ] [ ] [ ] [ ] [ ]
| 20. Develops positive working relationships by earning the respect and confidence of others. |[ ] [ ] [ ] [ ] [ ] [ ]
| 21. Expresses ideas effectively in group situations and seeks ideas and feedback from others when needed |[ ] [ ] [ ] [ ] [ ] [ ]
|  *Brief explanation:*  |
| Overall Performance Rating for Employee: (overall rating should be the average of the above scores – scores should be added together and divided by 21) |
|   Unsatisfactory [ ]  Inconsistent [ ]  Proficient [ ]  Highly Effective [ ]  Exceptional [ ]  |

*Additional performance competencies for employees with supervisory responsibilities.*

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
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| Managing Performance: | 5 | 4 | 3 | 2 | 1 | N/A |
| 1. Defines position requirements and hires competent employees |[ ] [ ] [ ] [ ] [ ] [ ]
| 2. Sets aggressive but achievable objectives for staff |[ ] [ ] [ ] [ ] [ ] [ ]
| 3. Applies clear/consistent performance standards |[ ] [ ] [ ] [ ] [ ] [ ]
| 4. Identifies and corrects performance problems by giving effective feedback including giving fact-based positive recognition |[ ] [ ] [ ] [ ] [ ] [ ]
| 5. Provides guidance and assistance to improve performance |[ ] [ ] [ ] [ ] [ ] [ ]
| 6. Supports the development efforts of others by providing opportunities for staff to expand their skills |[ ] [ ] [ ] [ ] [ ] [ ]
|  *Brief explanation:*  |
| Leadership: | 5 | 4 | 3 | 2 | 1 | N/A |
| 7. Sets group goals in alignment with the organization’s strategic goals and believes in the organization’s vision  |[ ] [ ] [ ] [ ] [ ] [ ]
| 8. Embraces the need for continuous change and improvement  |[ ] [ ] [ ] [ ] [ ] [ ]
| 9. Delegates effectively |[ ] [ ] [ ] [ ] [ ] [ ]
| 10. Leads by example |[ ] [ ] [ ] [ ] [ ] [ ]
| 11. Motivates, encourages, and rewards the contributions of others |[ ] [ ] [ ] [ ] [ ] [ ]
| 12. Accepts accountability for the actions and results of their team |[ ] [ ] [ ] [ ] [ ] [ ]
|  *Brief explanation:*  |
| Overall Performance Rating for Supervisors/Managers: (overall rating should be the average of the above scores – scores should be added together and divided by 33) |
|   Unsatisfactory [ ]  Inconsistent [ ]  Proficient [ ]  Highly Effective [ ]  Exceptional [ ]  |

Performance Summary (unless already explained above, please answer the following questions and add additional pages as necessary):

1. If performance goals were set at the last performance review, attach a copy of these goals and comment on the employee’s progress.

1. List all aspects of an employee’s performance that contribute to his or her effectiveness.

1. List aspects of an employee’s performance that require improvement for greater effectiveness.

1. In what way is the employee ready for increased responsibility? What additional training will he/she need to be successful?

Performance Development Plan and Goal Setting

(Individual goals should support the overall departmental and organizational goals.)

1. List the employee’s performance goals for the coming year.

*(Performance goals are job-oriented. They are results-based statements of the employee’s important ongoing and special project responsibilities.)*

Goal 1:

Goal 2:

1. List the employee’s development goals for the coming year.

*(Developmental goals are learning-oriented. They spell out the skills, knowledge and experiences the employee needs to either remain effective in his/her current job or support the employee’s ability to take on new responsibilities and grow in his/her career.)*

Goal 1:

Goal 2:

1. In the coming year, how will the manager and employee coordinate to accomplish the above goals?

*This annual performance review will become part of your permanent file. Please sign below to acknowledge that you have received this document.*

Employee’s signature: ­­­­­­­­­­­ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Supervisor’s signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\*Pastor/Administrator/Principal: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*(Required if Overall Performance Rating is Unsatisfactory)*

\*Human Resource signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*(Required if Overall Performance Rating is Unsatisfactory)*

*\*If applicable: Pastor/Administrator/Principal signature required for Parish/School Employees only*

 *Human Resource signature required for Diocesan Employees only*