



CATHOLIC DIOCESE OF ROCKFORD EMPLOYEE PERFORMANCE APPRAISAL

MANAGEMENT EMPLOYEES

Employee Name: _____

Position: _____

Supervisor: _____

Appraisal Period: _____

EVALUATION OF PERFORMANCE FACTORS

(Evaluate employee on each factor and provide specific comments on performance to clarify ratings)

Job Knowledge

- ☐ 1 – Inadequate knowledge of job duties. Does not apply knowledge and skills.
- ☐ 2 – Needs additional knowledge and skill to fulfill requirements. Requires frequent direction to apply knowledge/skills properly
- ☐ 3 – Properly applies skills and knowledge of techniques, procedures, products and materials to perform job duties. Requires minimal supervisory assistance.
- ☐ 4 – Job knowledge and skill above average. Understands all phases of job.
- ☐ 5 – Seeks additional job knowledge and skills and applies such to the overall improvement of the department/office.

Comments:

Quality of Work

- ☐ 1 – Product or work performance is of poor quality. Errors are frequent.
- ☐ 2 – Work is incomplete and barely meets minimum standards. Requires frequent direction to improve quality. Recurrent errors.
- ☐ 3 – Work/product meets acceptable quality standards. Requires minimal direction. Usually accurate.
- ☐ 4 – Work is consistently high quality. Requires very little supervisory direction.
- ☐ 5 – Consistently thorough in carrying out all details of job and error free. Final product nearly perfect.

Comments:

Quantity of Work

- ☐ 1 – Work output is inadequate to meet job requirements.
- ☐ 2 – Slow. Below average volume of work. Falls behind in meeting productivity standards.
- ☐ 3 – Volume of work is satisfactory. Output is sufficient to meet minimum job requirements.
- ☐ 4 – Very industrious. Does more than expected. Often exceeds deadlines or schedules.
- ☐ 5 – Regularly exceeds standards of productivity. Consistently willing to do additional work. May accomplish special projects.

Comments:

Leadership

- ☐ 1 – Rarely if ever shows any initiative or vision. Does not motivate others. Department/office not meeting goals. Lack of trust within the department/office. Dissatisfied workforce.
- ☐ 2 – Some leadership displayed, but efforts inconsistent or with poor results. Requires some direction or prodding from superiors. Lack of direction within the department/office. Dissatisfied workforce.
- ☐ 3 – Acceptable level of leadership. Department/office meeting most goals. Majority of employees satisfied. Delegates sufficient number of duties. Employees motivated to perform.
- ☐ 4 – Consistently high level of leadership. Department/office consistently meets its goals. Unified workforce that is motivated to perform. Leads by example. Has the ability to manage most circumstances.
- ☐ 5 – Highest level of leadership. Department/office sets and achieves goals. Effective delegation and coordination of department/office work. Highly motivated employees working in an open/trusting work environment.

Comments:

Customer Service (internal and external customers/constituents)

- ☐ 1 – Blunt. Distant and aloof. Does not appear to care if others are satisfied. Rarely acts in way which promote courtesy or service. Makes little effort to sustain favorable image. May arouse customer/constituent anger.
- ☐ 2 – Occasionally acts in ways to promote good service. Sometimes lacks follow through or makes inappropriate comments.
- ☐ 3 – Promotes a favorable image and manages most interactions appropriately. Approachable and accessible. Responds promptly to customer/constituent inquiries. Readily assists to provide good service. Gives priority to satisfying others.
- ☐ 4 – Frequently exceeds job responsibilities to satisfy customers/constituents. Takes pride in demonstrating expertise in meeting or anticipating customer/constituent requests.
- ☐ 5 – Inspires others to be service oriented. Excellent at establishing good will. Takes a pro-active approach to recognizing the needs of customers and providing creative solutions.

Comments:

Fiscal Responsibility

- ☐ 1 – Expenditures/revenues far from budget without any explanation. Fiscally irresponsible. Not a steward of Diocesan resources.
- ☐ 2 – Some unacceptable variance from budget. Lack of effective efforts in addressing fiscal matters.
- ☐ 3 – Fiscally responsible. Department/office operations within budget or acceptable explanation for variance.
- ☐ 4 – High level of fiscal responsibility. Department/office within budget. May reduce costs without impacting effectiveness of department/office.
- ☐ 5 – Extremely fiscally responsible. Finds way to operate a highly effective department/office within fiscal restraints. Creative but appropriate solutions to budgeting issues. Takes initiative to find sources of revenue.

Comments:

Teamwork/Cooperation

- ☐ 1 - Disruptive and antagonistic in working with others. Does not appear to care whether cooperation is extended or not. Chronically complains or criticizes. Acts independently without respect to how actions affect others.
- ☐ 2 – Usually gets along well with others. Occasional conflict with supervisor and/or personnel. Often allows personal feelings to interfere with work and co-worker relationships. May have difficulty accepting constructive criticism. Sometimes make inappropriate comments.
- ☐ 3 – Works effectively as a team member. Responds well to supervision and direction. Accepts constructive criticism.
- ☐ 4 – Works well with others. Consistently contributes when deadlines are critical. Represents department/office favorably. Actions compliment efforts of other employees.
- ☐ 5 – Exceptional team player whose contributions to the group are significant. Seeks constructive criticism and uses in a positive manner. Inspires others through behavior.

Comments:

Judgment/Decision Making

- ☐ 1 – Makes decision without basis. Neglects to take appropriate action. Does not make use of available information. Does not use common sense on the job.
- ☐ 2 – Occasional inability to make sound decisions. Sometimes makes hasty decision without using available information. Sometimes fails to seek assistance.
- ☐ 3 – Generally demonstrates logical thinking by making sound decisions after considering available facts.
- ☐ 4 – Sound judgment and common sense exercised. Often makes appropriate recommendations for solution of problems. Adequate decision in almost all situations.
- ☐ 5 – Displays exceptional ability to analyze and deal with a variety of situations that otherwise could be potential problems.

Comments:

Communication

- ☐ 1 – Communication is poor and cannot be interpreted or understood clearly. Letters and reports contain frequent errors and pertinent information is not included. Does not listen to others. Infrequent attempts at communication.
- ☐ 2 – Has difficulty with expressing clear and concise thoughts in individual and/or group situations. Often omits important information, making communication difficult to interpret. Tends to be a poor listener. Subordinates do not have a clear understanding of what is expected of them.
- ☐ 3 – Generally expresses ideas in a clear and concise manner with adequate coverage of material. Prepares and delivers effective presentations given adequate preparation and practice time. Listens well most of the time. Sets understandable expectations for subordinates.
- ☐ 4 – Communications are effective in individual and group settings. Information is clear, concise, well organized and easy to understand. Covers all important elements. Listens well. Gives feedback to subordinates.
- ☐ 5 – Communications are very effective. Statements are very sound and communicated in a clear and understandable manner. Communicates well in difficult situations. Uses the best method to communicate information based on audience and materials. Listens intently. Takes initiative to ensure employee feedback received by subordinates in a timely manner.

Comments:

Supervision/Development of Others

- ☐ 1 – Displays no interest in developing staff. Does not delegate responsibilities to provide developmental opportunities. Does not encourage interaction between self and subordinates.
- ☐ 2 – Does not effectively counsel others regarding their performance. May play favorites. Tends to be insensitive to individual needs. Often does not provide developmental opportunities.
- ☐ 3 – Recognizes differing employee needs and provides training and/or developmental opportunities for some employees. Assumes most development should be self-initiated. Provides performance counseling when sensitive situations arise. Completes annual performance appraisals.
- ☐ 4 – Counsels others effectively regarding their performance and involves them in identifying their needs and preparing a development plan. Offers developmental opportunities when they arise. Provides ongoing performance counseling. Annual performance appraisal completed on a timely basis.
- ☐ 5 – Creates opportunities to satisfy developmental needs. Inspires and encourages people to perform at their highest level and utilize their developmental experiences. Provides ongoing and proactive performance counseling, identifying better methods to improve performance and assume new responsibilities.

Comments:

SUPERVISORY AND EMPLOYEE COMMENTS

Both supervisor and employee consider other comments, concerns, previous year's accomplishments, training needs, or other areas deserving additional discussion or recognition.

Supervisor Comments.

Employee Comments.

OVERALL PERFORMANCE RATING

TOTAL OF NUMERIC RATINGS ÷ NUMBER OF CATEGORIES RATED = OVERALL RATING

_____ ÷ _____ = _____

SIGNATURES

Employee

Date

Supervisor

Date



CATHOLIC DIOCESE OF ROCKFORD EMPLOYEE SELF APPRAISAL OF PERFORMANCE

Accomplishments – Please comment on your performance over the past 12 months. Note progress on any goals and objectives set for you. Note any other accomplishments.

Goals - Note the goals you would like to establish for the coming evaluation period.

Suggestions for Job Improvement - Note any changes you would like to see in your job duties or the way in which they are performed.

Areas of Performance Improvement - Note areas of performance where improvement is needed or desired.

Additional training and experience - Note areas in which you could use more experience and/or training.

Other Comments – Note any other comments you wish to make about your position or your performance.