**Annual Performance Appraisal Form** (NON-Management)

Name of Employee \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Position Title \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Supervisor Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Position Title \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Review Period (from) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ to \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Part I: Evaluation of Employee Performance in each Category**

*Directions:* Examine the descriptions under each category and select the appropriate rating. Selections must be supported by narrative in the Comments section that lists clear examples and results that justify the rating selected. Supervisors should be prepared to effectively communicate to the employee any distinctions between the standard and the actual performance by clearly illustrated examples. Supervisors should also note any specific desired improvements in that area.

**Rating Scale**

The five-tiered rating scale below should be used to rate the employee’s performance in each of the categories that follow.

**Consistently Exceeded Performance Standards (5)**

Regularly made exceptional contributions that had a significant and positive impact on the performance of the Office, Pastoral Center, and/or Archdiocese of Miami entities.

**Exceeded Performance Standards (4)**

Significantly exceeded performance standards often in several areas.

**Met Performance Standards (3)**

A good, productive employee who does the job well. Consistently met all performance standards and objectives and occasionally exceeded some.

**Improvement Needed in Some Areas (2)**

Did not consistently meet all performance standards or job requirements and occasionally achieved unsatisfactory results.

**Consistently Below Performance Standards (1)**

Unable or unwilling to complete all job requirements; requiring support and constant supervision.

**Categories**

Each category describes a desired competency for a non-management employee working for the Archdiocese of Miami entities. The descriptions under each category are examples only and not an exhaustive list.

**1. Position Knowledge and Skills**

* Maintains and demonstrates familiarity with requirements and expectations of the position and understands the procedures, processes, and practices needed to perform the job.
* Demonstrates understanding of how position relates to others in work area and entity of service.
* Keeps knowledge and skills current with standards in field; actively seeks learning opportunities to do so.
* Learns and uses new technologies to achieve best results.

**Rating:** Consistently Exceeded **/** Exceeded **/** Met **/** Improvement Needed **/** Consistently Below … Performance Standards

**Comments:**

**2. Work Quality**

* Completes work thoroughly and accurately, resulting in minimal adjustments and/or revisions.
* Monitors and evaluates own work to ensure quality: systematically reviewing, testing, checking, and proofreading.
* Accepts feedback willingly and makes efforts to improve.
* Keeps work and work area neat, clean and safe according to expectations of the position.
* Helps others on team to succeed, pursuing a team approach to achieve the best results.

**Rating:** Consistently Exceeded **/** Exceeded **/** Met **/** Improvement Needed **/** Consistently Below … Performance Standards

**Comments:**

**3. Focus on Client / Person Served**

* Appropriately represents Archdiocese / parish / school with a service-oriented and positive demeanor so all persons served experience that their needs are addressed in the best manner possible; takes responsibility that the person served is treated in a dignified manner.
* Listens attentively, respectfully, patiently, and empathetically, maintaining focus on the needs of the person served even in challenging situations.
* Demonstrates consideration to the next person to receive the job or task in the process.
* Openly shares information with others and works to find solutions that benefit all parties involved.

**Rating:** Consistently Exceeded **/** Exceeded **/** Met **/** Improvement Needed **/** Consistently Below … Performance Standards

**Comments:**

**4. Productivity**

* Produces desired amount of work and results, working diligently to accomplish assignments and tasks.
* Manages time well, understanding priorities and completing assignments on schedule.
* Demonstrates determination in tackling goals, objectives and assignments.
* Maintains focus on productivity goals of entire team and not just self.

**Rating:** Consistently Exceeded **/** Exceeded **/** Met **/** Improvement Needed **/** Consistently Below … Performance Standards

**Comments:**

**5. Flexibility**

* Adjusts to the changes in needs, priorities and structure of office, organization, or position, while maintaining effective output.
* Accepts additional assignments willingly and unhesitatingly.
* Reviews priorities and is unafraid to ask questions to clarify priorities.

**Rating:** Consistently Exceeded **/** Exceeded **/** Met **/** Improvement Needed **/** Consistently Below … Performance Standards

**Comments:**

**6. Initiative**

* Takes action to get things done, responding quickly to problems that arise; a self-starter who seeks additional tasks.
* Uses innovative approaches to seek solutions.
* Contributes to developing and implementing new ideas and improvements in processes.
* Anticipates problems that may arise and takes or suggests measures to prevent them.

**Rating:** Consistently Exceeded **/** Exceeded **/** Met **/** Improvement Needed **/** Consistently Below … Performance Standards

**Comments:**

**7. Dependability**

* Keeps absences, tardiness and breaks within established guidelines.
* Is reliable and accountable for her/his work; eagerly cooperates when needed.
* Meets deadlines and priorities and completes assignments and projects on time.
* Demonstrates stewardship of the resources of the Archdiocese / parish / school.

**Rating:** Consistently Exceeded **/** Exceeded **/** Met **/** Improvement Needed **/** Consistently Below … Performance Standards

**Comments:**

**8. Adherence to Guidelines and Acting with Professionalism**

* Demonstrates support of the mission and tenets of the Archdiocese / parish / school and positive attitude toward entity where employee serves.
* Demonstrates respect for authority; inspires trust and respect from others.
* Demonstrates respect for the dignity of those served and other employees. Refrains from gossip and divisiveness.
* Adheres to policies and procedures established in the entity and office / position.
* Follows guidelines on dress code, wearing appropriate (including safety, if required) attire
* Maintains effectiveness and professionalism under pressure. Works through conflicts that may arise.
* Follows procedures established for safety and security. Reports unsafe conditions.
* Protects confidential information.

**Rating:** Consistently Exceeded **/** Exceeded **/** Met **/** Improvement Needed **/** Consistently Below … Performance Standards

**Comments:**

**9. Communication**

* Maintains open lines of communication with supervisor, escalating issues appropriately and responding in a timely manner.
* Communicates problems, issues and ideas with clarity, asking questions when not comprehending message.
* Tailors message and media for appropriate audience, ensuring that the audience understands the message.
* Exercises good judgment in selection of communication technologies; strives to keep abreast of communications technologies best suited for job
* Uses respectful and appropriate language, good grammar and good spelling in oral and written communication.

**Rating:** Consistently Exceeded **/** Exceeded **/** Met **/** Improvement Needed **/** Consistently Below … Performance Standards

**Comments:**

**10. Job-Related Category: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.
* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

**Rating:** Consistently Exceeded **/** Exceeded **/** Met **/** Improvement Needed **/** Consistently Below … Performance Standards

**Comments:**

**Part II: Summary of Performance**

**Summary of Ratings to obtain Overall Rating of Performance**

The compilation of ratings selected for each of the above categories should be used to determine the overall performance rating. The six-tiered rating scale below offers a description of overall performance in addition to a scoring guide based on the instances of specific ratings in each category.

**Clearly Outstanding Overall Performance**

**Scoring**: **Consistently Exceeded Performance Standards** in eight or more categories;

**Exceeded Performance Standards** in the rest.

This employee’s contributions have had an extraordinary and positive impact on the performance of the Archdiocese / parish / school.

**Consistently Exceeded Performance Standards**

**Scoring**: **Consistently Exceeded Performance Standards** in six or more categories;

**Exceeded Performance Standards** in two or more;

**Met Performance Standards** in no more than two categories.

This employee’s contributions have had a significant and positive impact on the performance of the Archdiocese / parish / school.

**Exceeded Performance Standards**

**Scoring**: **Exceeded Performance Standards** more often than not;

No more than one category targeted for **Improvement.**

This employee’s work has a positive impact on the performance of the Archdiocese / parish / school.

**Met Performance Standards**

**Scoring**: **Met Performance Standards** more often than not;

No more than two categories have been targeted for **Improvement.**

This is a good, productive employee who does the job well. This employee has consistently met most performance standards and objectives and occasionally exceeded some.

**Generally Met Performance Standards with some needed improvement**

**Scoring**: **Met Performance Standards** more often than not;

No more than two categories have been targeted for **Needed Improvement**;

No more than one category has **Consistently Below Performance Standards.**

This employee has met performance standards in most areas of the position; however, has had unsatisfactory results in some areas. A performance improvement plan will accompany this document and another performance evaluation will be completed six months from the date of this review.

**Did Not Meet Performance Standards**

**Scoring**: **Consistently Below Performance Standards** in 3 or more areas.

This employee has required continuing support and constant supervision, and must show immediate improvement as indicated in the attached performance improvement plan, in order to remain employed in position. Additional reviews will take place every 30 days for the next three months, and another performance evaluation will be completed six months from the date of this review.

**Overall Rating of Performance:**

**Additional Supervisor Comments:**

**Expectations for Future**

* Employees who have exceeded (in any degree) or met performance standards will be given a development plan with goals for the next year.
* Employees whose overall performance needs significant improvement will be given a performance improvement plan and will have another evaluation of performance six months from date of this review.

**Attached (circle one): Goals for FY2017 / Performance Improvement Plan**

**Employee Comments:**

**Signatures:**

Supervisor: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

I hereby acknowledge receipt of this evaluation. (Employee Signature, below:)

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Pastor, Principal or COO \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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