|  |  |
| --- | --- |
| **Employee Name:**  **Position Title:**  **Department:** | **Supervisor Name:**  **Date of Review:**  **For Period: To** |

At the beginning of each performance cycle, employee and supervisor review key responsibilities (from the job description) or establish performance objectives (based on the strategic plan or department objectives). The supervisor and employee document specific performance objectives to be achieved, as well as outcomes that describe how successful performance will be measured. Employee and supervisor then assign a priority to each activity or objective. These will be documented in the Performance Planning Worksheets that follow.

Ongoing communication regarding achievement of goals is expected, both in informal and formal settings throughout the year. The supervisor or employee can initiate discussion.

At the end of each performance cycle, a formal review of achievements in relation to objectives is documented. This includes a summary of employee performance during the performance cycle in relation to individual goals and objectives. Feedback will be sought from each department or team on which the employee served to gain a more complete perspective on how the employee has performed in relation to assigned work objectives during the performance cycle.

The following ratings are given to indicate how the employee has performed in relation to performance goals and expectations.

**RATINGS SCALES**

|  |  |  |
| --- | --- | --- |
| **Rating Level** | | |
| **B =** **Below Standards or Expected Results**  Performance did not fully meet expectations. Employee did not fully achieve assigned goals. Work assignments were not consistent in meeting quality standards or deadlines. Employee required more supervision than expected, given time within the position. | **M = Meets Expectations**  Regularly met work goals and objectives. As a general rule, work assignments were completed on time and met all quality standards. Employee functioned independently, with normal amount of supervision. | **E = Exceeds Expectations**  Quality and quantity of work was routinely higher than expected. Contributions were highly visible and acknowledged by peers, management or external contacts. |

**Section I - Performance Planning Worksheet: Setting Individual Performance Objectives**

|  |  |
| --- | --- |
| **Employee Name**:  **Position Title**: **Department:** | **Supervisor Name:**  **Date of Review**:  **For Period:** **From** **To** |

At the beginning of the performance cycle, employee and supervisor review key responsibilities or establish performance objectives with the employee based on the strategic plan or program objectives. The supervisor documents specific outcomes to be achieved, in a way that describes how successful performance will be measured. Employee and supervisor then assign a “Priority” (high, medium or maintenance) for each activity or objective. The priority designation guides both employee and supervisor in monitoring activities relative to their importance to the organization. Employee and supervisor establish appropriate timeframes for regular performance feedback to monitor progress toward achieving goals. Such timeframes may be weekly (“W”), monthly (“M”), quarterly (“Q”), semi-annually (“6 mos.”) or annually (“A”).

**Parish Administrator examples:**

**~Generate newcomer welcome letters within 3 days of receipt of names. –Weekly**

**~Assemble all vestry materials and update vestry binders – Monthly**

**~Generate parish mailing lists – 6 months**

**~Compile information and coordinate preparation of parochial report – Annually**

It is expected that the employee and primary supervisor will meet throughout the performance cycle to review progress, identify and resolve problems and modify this plan, if necessary. If the plan is modified (*i.e.,* objectives, outcomes or priorities are changed), the data should be noted to track changes in strategic direction affecting performance goals. As appropriate, comments on employee performance may be gathered from relevant co-workers or department heads.

**Parish Administrator Example**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **DATE**  **MODIFIED** | **KEY RESPONSIBILITY/**  **PERFORMANCE OBJECTIVE** | **EXPECTED OUTCOME** | **PRIORITY** | **FEEDBACK**  **FREQUENCY** | **SELF-RATING** | **SUPERVISOR**  **RATING** | **FINAL**  **RATING** |
|  | Generate newcomer welcome letters w/in 3 days of receipt of names  Assemble vestry materials and keep vestry binders updated | Timely welcome of new members  Relevant materials available for vestry meetings and accurate up-to-date record keeping | High  Maintenance | Weekly  Monthly |  |  |  |

**Section I - Performance Planning Worksheet: Setting Individual Performance Objectives**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **DATE**  **MODIFIED** | **KEY RESPONSIBILITY/**  **PERFORMANCE OBJECTIVE** | **EXPECTED OUTCOME** | **PRIORITY** | **FEEDBACK**  **FREQUENCY** | **SELF-RATING** | **SUPERVISOR**  **RATING** | **FINAL**  **RATING** |
|  |  |  |  |  |  |  |  |

**Section II - PERFORMANCE FACTORS**

The following factors are important indicators of the skills and abilities an employee brings to the performance of his or her duties. In addition to evaluating key responsibilities and performance objectives, these performance factors help to assess total performance. At the beginning of the 12-month performance cycle, supervisors and employees identify which factors are required and their expectations for successful performance. These performance expectations may be explained in the “Comments” section.

At the end of the 12-month performance cycle, the supervisor rates the degree -- B (Below Standards/Expectations), M (Meets Expectations) or E (Exceeds Expectations) -- to which the employee reflects these characteristics in the regular performance of his/her duties. Use specific examples and comments to illustrate your rating.

| **Performance Factors** | **Applicable** | **Not Applicable** | **Self Rating** | **Supervisor Rating** | **Final Rating** |
| --- | --- | --- | --- | --- | --- |
| PROFICIENCY IN CURRENT ROLE:   1. Demonstrates knowledge of position or team role. 2. Relates responsibilities to other positions and organization goals. |  |  |  |  |  |
| QUALITY OF WORK:   1. Maintains standards consistently, even under difficult circumstances. |  |  |  |  |  |
| QUANTITY OF WORK:   1. Produces acceptable volume of work in a timely manner. |  |  |  |  |  |
| PLANNING AND ORGANIZATION OF WORK:   1. Establishes priorities and anticipates and prepares for changing workload or working conditions. 2. Coordinates and uses available resources to get work done to assure important deadlines are met. |  |  |  |  |  |
| INITIATIVE:   1. Works independently. 2. Demonstrates willingness to assume additional responsibility and suggests improvements. |  |  |  |  |  |

| **Performance Factors** | **Applicable** | **Not Applicable** | **Self Rating** | **Supervisor Rating** | **Final Rating** |
| --- | --- | --- | --- | --- | --- |
| INTERPERSONAL RELATIONS:   1. Maintains positive working relationships. 2. Is flexible and willing to cooperate with others. 3. Demonstrates ability to listen and understand. |  |  |  |  |  |
| COMMUNICATION SKILLS:   1. Expresses self well orally. 2. Presents written work clearly, succinctly, using appropriate grammar and style. |  |  |  |  |  |
| TEAM PARTICIPATION:   1. Undertakes tasks assigned. 2. Works cooperatively with team members. 3. Demonstrates clear understanding of team goals. |  |  |  |  |  |
| PUNCTUALITY AND ATTENDANCE: |  |  |  |  |  |
| OTHER: (Specify other critical Performance Factors here) |  |  |  |  |  |

**COMMENTS:**

**Evaluate the following performance factors for *Managers Only***

| **Performance Factors** | **Applicable** | **Not Applicable** | **Self Rating** | **Supervisor Rating** | **Final Rating** |
| --- | --- | --- | --- | --- | --- |
| PLANNING SKILLS:   1. Analyzes current and future needs; sets appropriate objectives, plans, procedures; allocates resources (budget, staff, time, space, etc.). |  |  |  |  |  |
| ORGANIZING & CONTROLLING SKILLS:   1. Sets up and enforces quality and time guidelines on projects. 2. Delegates authority appropriately. 3. Coordinates work within and between departments or teams. |  |  |  |  |  |
| SUPERVISORY, LEADERSHIP & COMMUNICATION SKILLS:   1. Keeps staff informed of what is happening in the organization. 2. Provides clear instructions and guidance. 3. Leads, develops, trains and motivates staff. 4. Promotes teamwork and builds consensus. |  |  |  |  |  |
| EVALUATION SKILLS:   1. Measures and evaluates results against plan. 2. Appraises staff and provides effective feedback. |  |  |  |  |  |
| JUDGMENT SKILLS:   1. Exercises professionalism, discernment and discretion in assessing and handling people and situations and in making decisions. |  |  |  |  |  |
| ACCOUNTABILITY:   1. Accepts accountability for follow through and results within the scope of own responsibility. |  |  |  |  |  |
| OTHER: (Specify other critical skills here) |  |  |  |  |  |

**COMMENTS:**

**Section III - DEVELOPMENT GOALS**

Employee and supervisor discuss and document development goals to be achieved during the next performance cycle. These may include formal training or education courses, on-the-job training, temporary project assignments or mentoring programs. This should include an assessment of how much a priority the development goal is: (C) = Critical; (M) = Moderate; and (VA) = Value Added.

Target dates for achievement of these development goals are outlined, along with any measures to demonstrate application of new skills or knowledge. To identify these goals, employee and supervisor review development needs identified in the previous performance cycle. This document can be used throughout the year to document immediate training and development needs that may arise or have been achieved.

|  |  |  |  |
| --- | --- | --- | --- |
| **Development Goals** | **Priority** | **Target Dates** | **Indicators of Achievement** |
|  |  |  |  |

**OVERALL PERFORMANCE RATING**

To arrive at an overall performance rating, review the ratings for each of the following:

1. **Section I: Individual Performance Objectives**
2. **Section II: Performance Factors**

Consider how important each of the above sections is to the job and the employee’s contributions during the past performance cycle. Weight each section accordingly and then determine the overall rating, using the rating scales from page 1.

**ENTER OVERALL RATING:**

|  |  |  |
| --- | --- | --- |
| **Overall Rating** | | |
| **Self-Rating** | **Supervisor Rating** | **Final Rating** |
|  |  |  |

**SIGN-OFF AND REVIEW** (Please indicate date signed after your signature)

|  |  |  |
| --- | --- | --- |
|  | **Signature** | **Date** |
| Employee\* |  |  |
| Supervisor |  |  |
| Next-level Review |  |  |

**\*Your signature indicates neither agreement nor disagreement with the content of this form. It acknowledges only that you have been given the opportunity to read it and to respond to it.**