

## **PERFORMANCE APPRAISAL**

The Diocese believes in both the affirmation and accountability of job performance evaluated in the context of a performance appraisal. This appraisal serves both the needs of the Diocese to evaluate its mission and effectiveness and is an aid in the development of the individual's contribution.

The first formal probationary evaluation will be conducted approximately 180 days from hire. Thereafter, a written performance appraisal (See Appendix D-8 Performance Review Parish/Chancery) of each employee will be done once each year by the supervisor based on the position's description. The time between Easter and June 30<sup>th</sup> each year is set aside for the completion of Performance Appraisal. Employees should be informed by supervisors that appraisals will be conducted during this time and a time for the employee to return the completed appraisal to the supervisor should be set. This time should be approximately 3-5 days prior to the Performance Appraisal conference. Each employee's active participation in the appraisal process is critical to the success and purpose of the review. Accomplishments, affirmations, recommendations, new job requirements, goals and action plans are all appropriate aspects of the performance appraisal. Both the Employee and Supervisor should comment on each area of the Appraisal which is then signed by both employee and supervisor. At the Chancery, the Appraisal is also signed by the Division Director responsible for the particular Department; at the Parish, if the Pastor or Parochial Administrator or Director of Parish Life is not the immediate supervisor, he is also to sign the Appraisal.

The performance appraisal will be discussed with the employee and become part of the personnel file. When the employee signs the appraisal, this signature verifies receipt and review, and does not necessarily imply agreement. Each employee has an opportunity to respond in writing to his or her appraisal, and this response will become part of the appraisal and the personnel file.

### **SOME GUIDELINES TO USE IN THE APPRAISAL PREPARATION**

Step 1: Review the job description and update if necessary

- To be comprehensive the job description should include both key result areas and significant work relationships;
- That the job description adequately reflects the reality of the current position.

Step 2: Measure performance

- The focus should be on the measurement of performance in light of the job description and key result areas;
- Which goals were achieved and which were not;
- What has been the most significant accomplishment;
- What area or areas need attention

Step 3: Develop goals and strategies for future work. Consideration of goals might include:

- Quality of work;
- Quantity of work;

- Following policies and procedures;
- Use of time;
- Professional development;
- Quality of relationship with peers and those supervised;
- Initiative;
- Judgement/Resourcefulness/Creativity/Flexibility/Communication/Conflict Resolution Skills.

Step 4: Supervisor's support plan specify the ways the supervisor will support the goals and strategies. The support plan might include:

- Management style and supervisor's approach;
- Skill development;
- Appreciation/access/acknowledgement/communication/issues of clarity;
- What resources and assistance does the employee need to make these/their goals a reality?

This is also an appropriate time to review and update, if necessary, the employee's emergency form and I-9 form.