

## **INSTRUCTIONS FOR PERFORMANCE REVIEW (Deacon)**

The Diocese of Lexington believes in the accountability and the affirmation that occurs in the context of a performance review. This serves not only the needs of the Diocese to evaluate effectiveness, but also is an aid in the development of the individual's contribution.

A deacon's written performance review is based on an assessment of his ministry, and it shall encompass the entire fiscal year. The review is the responsibility of the supervisor and is based on the deacon's Letter of Appointment and the specific goals and objectives set for/with the deacon. Each deacon's active participation in the process of the review is critical to the success and purpose of the review. Past accomplishments, affirmations, recommendations, new requirements, and action plans and goals are all essential ingredients of the performance review.

At the beginning of the fiscal year the supervisor and deacon should meet to discuss and confirm objectives based on the Parish Mission Statement, the parish goals, and the deacon's Letter of Appointment. At this meeting they should discuss the following:

- a plan for continued growth in ministry
- agree on key responsibilities and assignments
- determine results expected for each key responsibility
- agree on what deacon expenses the parish will pay, including an amount for the deacon and his wife to attend an annual retreat, an allowance for continuing education, and other appropriate expenses. (Specifics concerning these expenses are available from the Office of the Permanent Diaconate)

Toward the end of the fiscal year, by late May or early June, the deacon should do a self-review and give it to his supervisor. The supervisor will review the input from the self-review and record the results achieved by the deacon in his key responsibilities. The supervisor will then assign an overall rating that best describes the deacon's performance. The supervisor and the deacon will have a year-end evaluation meeting, which will result in some preliminary objectives being set for the next year. Together, they will complete the form, and the supervisor will file one copy at the parish and forward another copy to the Office of the Permanent Diaconate at the Catholic Center.

The performance review will be discussed with the deacon and will become a part of his personnel file. The deacon's signature does not necessarily indicate agreement with the review, only that he has reviewed it. Each deacon shall have an opportunity to respond in writing to his review. If a written response is given it becomes a part of the review.

**DEACON PERFORMANCE REVIEW**  
**to be completed with the PASTOR/PARISH PRIEST or PRIEST SUPERVISOR**

Name: \_\_\_\_\_ Month/Year of Review: \_\_\_\_\_

Parish Name: \_\_\_\_\_

The deacon being evaluated completes Parts I, II, III and Addendum I, the DEACON'S RETREAT AND CONTINUING EDUCATION LOG. The Pastor/Parish Priest or the Supervising Priest completes PART IV.

Use the following performance rating system for parts III and IV and add comments for clarity and elaboration.

- 4      Excellent performance
- 3      Above average performance
- 2      Performance meets requirements
- 1      Performance fails meet requirements

**PART I:** Describe an experience during this period that energized you in ministry:

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**PART II:** Describe an experience during this period that drained you in ministry:

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**PART III:** List up to five key goals/responsibilities, based on your Letter of Appointment and the goals and objectives set with your supervisor, and evaluate your performance.

1. Key Responsibility: \_\_\_\_\_  
Circle Rating : 4 3 2 1

Comment: \_\_\_\_\_

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2. Key Responsibility: \_\_\_\_\_  
Circle Rating: 4 3 2 1

Comment: \_\_\_\_\_

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3. Key Responsibility: \_\_\_\_\_  
Circle Rating: 4 3 2 1

Comment: \_\_\_\_\_

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4. Key Responsibility: \_\_\_\_\_

Circle Rating: 4 3 2 1

Comment: \_\_\_\_\_

5. Key Responsibility: \_\_\_\_\_

Circle Rating: 4 3 2 1

Comments: \_\_\_\_\_

**PART IV** Completed by the supervisor and reviewed with the deacon.

<b>SKILLS</b>	<b>RATING</b>	<b>COMMENTS</b>
<u>Pastoral Qualities:</u>		
Contributes to a sense of community	4 3 2 1 _____	
Assists or presides well at parish liturgies/prayer	4 3 2 1 _____	
Maintains a spirit of hope	4 3 2 1 _____	
Articulates a sense of parish vision	4 3 2 1 _____	
Listens – uses conflict management skills	4 3 2 1 _____	
Homiletics/preaching	4 3 2 1 _____	
<u>Leadership Qualities:</u>		
Consults others when needed	4 3 2 1 _____	
Delegates appropriately	4 3 2 1 _____	
Plans, organizes, and sets goals	4 3 2 1 _____	
Manages effectively under pressure	4 3 2 1 _____	
Affirms co-workers	4 3 2 1 _____	
Shows initiative	4 3 2 1 _____	
<u>Administrative Qualities:</u>		
Holds/participates in meetings	4 3 2 1 _____	
Complies with diocesan policies	4 3 2 1 _____	
Administers budget with good stewardship	4 3 2 1 _____	
Completes reports clearly and on time	4 3 2 1 _____	



Personal Qualities:

Personifies love, understanding, and sensitivity in interpersonal relationships 4 3 2 1 \_\_\_\_\_

Engages in personal prayer 4 3 2 1 \_\_\_\_\_

Takes appropriate time for self 4 3 2 1 \_\_\_\_\_

Participates in continuing education 4 3 2 1 \_\_\_\_\_

**Overall evaluation of Deacon**

**Excellent**

**Above Average**

**Satisfactory**

**Needs Improvement**

**Unsatisfactory**

Summary of Strengths:

A. \_\_\_\_\_

B. \_\_\_\_\_

Summary of Improvement Needed:

A. \_\_\_\_\_

B. \_\_\_\_\_

Specific Goal(s) for improvement:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

GENERAL COMMENTS: \_\_\_\_\_

\_\_\_\_\_

Signature: \_\_\_\_\_  
(DEACON)

Signature: \_\_\_\_\_ Date: \_\_\_\_\_  
(PASTOR/PARISH PRIEST OR PRIEST SUPERVISOR)

Copies of this review are to be kept on file at the parish and sent to the Diaconate Office at the Catholic Center.

Addendum I to Deacons Performance Review

DEACON’S RETREAT AND CONTINUING EDUCATION LOG  
ROMAN CATHOLIC DIOCESE OF LEXINGTON

NAME \_\_\_\_\_ For Year \_\_\_\_\_

Deacons in the diocese of Lexington are expected to accrue a minimum of 20 actual hours of continuing education each year in addition to the annual retreat. The deacon community will sponsor approximately ten continuing education hours per year for deacons and their wives. The deacon couple is strongly encouraged to take advantage of these offerings. Various other agencies within the diocese offer programs to assist ministers seeking to update their skills. Reading, listening to tapes or viewing videos are valid ways of updating one’s professional ministry. It is recommended that their use should not count for more than ten hours of the total.

Please complete this form annually and attach it to your annual review.

- 1. Do you have a Spiritual Director: Yes \_\_\_\_\_ No: \_\_\_\_\_
- 2. Retreat(s) attended this year:

Location: \_\_\_\_\_

Date(s) of the retreat: \_\_\_\_\_

If not the Deacon Retreat, why this choice: \_\_\_\_\_

\_\_\_\_\_

- 3. Continuing Education Courses/Seminars/Study Days/ Videos/Audio Tapes etc. Please List Below. # of Hours
- (Reading materials considered for CEUs should be approved by the deacons’ supervisor or the Deacon Director)

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Total \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_