



Diocese of Pensacola - Tallahassee

Employee Evaluation

Comprehensive Form

EMPLOYEE NAME (FIRST, MI, LAST): _____

JOB TITLE: _____

DEPARTMENT: _____

PERIOD OF EVALUATION: From: _____ To: _____

PART I - INSTRUCTIONS TO RATER

Listed below are five performance factors, seven behavioral traits, and five supervisory factors that are important in the performance of the employee's job. Performance factors and behavioral traits must be utilized for all employees. The supervisor factors should be utilized only for employees with supervisory responsibilities. **NOTE: A rating of Unacceptable (1), Needs Improvement (2) or Superior (5) requires comments.** The "overall performance" evaluation should reflect the employee's total performance, including the performance factors as related to the employee's responsibilities and duties as set forth in the job description, behavioral traits and supervisory factors, if applicable.

DISTRIBUTION INSTRUCTIONS	<ol style="list-style-type: none">1. Return the original form to Human Resources2. Maintain one copy for your departmental records.3. Distribute one copy to the employee.
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MARKING INSTRUCTIONS	<ol style="list-style-type: none">1. The supervisor should indicate the employee's performance by using check box next to the appropriate level of performance.
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The following rating scale guide is being provided to assist the evaluator in assigning the most appropriate measurement of the employees' performance factors, behavioral traits and supervisory factors.

- 1 = UNACCEPTABLE** - Consistently fails to meet job requirements; performance clearly below minimum requirements. Immediate improvement required to maintain employment.
- 2 = NEEDS IMPROVEMENT** - Occasionally fails to meet job requirements; performance must improve to meet expectations of position.
- 3 = MEETS EXPECTATIONS** - Able to perform 100% of job duties satisfactorily. Normal guidance and supervision are required.
- 4 = EXCEEDS EXPECTATIONS** - Frequently exceeds job requirements; all planned objectives were achieved above the established standards and accomplishments were made in unexpected areas as well.
- 5 = SUPERIOR** - Consistently exceeds job requirements; this is the highest level of performance that can be attained.

PART II - PERFORMANCE FACTORS

Knowledge, Skills, Abilities – Consider the degree to which the employee exhibits the required level of job knowledge and/or skills to perform the job and this employee's use of established techniques, materials and equipment as they relate to performance.

Unacceptable Superior
☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

Comments: _____

1. **Quality of Work – Does the employee complete assignments meeting quality standards? Consider accuracy, neatness, thoroughness and adherence to standards and safety rules.**

Unacceptable Superior
☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

Comments: _____

2. **Quantity of Work – Consider the results of this employee's efforts. Does the employee demonstrate the ability to manage several responsibilities simultaneously; perform work in a productive and timely manner; meet work schedules?**

Unacceptable Superior
☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

Comments: _____

3. **Work Habits – To what extent does the employee display a positive, cooperative attitude toward work assignments and requirements? Consider compliance with established work rules and organizational policies.**

Unacceptable Superior
☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

Comments: _____

4. **Communication – Consider job related effectiveness in dealing with others. Does the employee express ideas clearly both orally and in writing, listen well and respond appropriately?**

Unacceptable Superior
☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

Comments: _____

PART III - BEHAVIORAL TRAITS

1. **Dependability** – Consider the amount of time spent directing this employee. Does the employee monitor projects and exercise follow-through; adhere to time frames; is on time for meetings and appointments; and responds appropriately to instructions and procedures?

Unacceptable Superior
☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

Comments: _____

2. **Cooperation** – How well does the employee work with co-workers and supervisors as a contributing team member? Does the employee demonstrate consideration of others; maintain rapport with others; help others willingly?

Unacceptable Superior
☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

Comments: _____

3. **Initiative** – Consider how well the employee seeks and assumes greater responsibility, monitors projects independently, and follows through appropriately.

Unacceptable Superior
☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

Comments: _____

4. **Adaptability** – Consider the ease with which the employee adjusts to any change in duties, procedures, supervisors or work environment. How well does the employee accept new ideas and approaches to work, respond appropriately to constructive criticism and to suggestions for work improvement?

Unacceptable Superior
☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

Comments: _____

5. **Judgment** – Consider how well the employee effectively analyzes problems, determines appropriate action for solutions, and exhibits timely and decisive action; thinks logically.

Unacceptable Superior
☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

Comments: _____

6. **Attendance** – Consider number of absences, use of annual and sick leave in accordance with Diocesan policy.

☐ Unacceptable ☐ Acceptable

Comments: _____

7. **Punctuality** – Consider work arrival and departure in accordance with departmental and Diocesan policy.

☐ Unacceptable ☐ Acceptable

Comments: _____

PART IV - SUPERVISORY FACTORS (IF APPLICABLE)

1. **Leadership** – Consider how well the employee demonstrates effective supervisory abilities; gains respect and cooperation; inspires and motivates subordinates; directs work group toward common goal.

Unacceptable Superior N/A
☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

Comments: _____

2. **Delegation** – How well does the employee demonstrate the ability to direct others in accomplishing work; effectively select and motivate staff; define assignments; oversee the work of subordinates?

Unacceptable Superior N/A
☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

Comments: _____

3. **Planning and Organizing** – Consider how well the employee plans and organizes work; coordinates with others, and establishes appropriate priorities; anticipates future needs; carries out assignments effectively.

Unacceptable Superior N/A
☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

Comments: _____

4. **Administration** – How well does the employee perform day-to-day administrative tasks; manage time; administer policies and implement procedures; maintain appropriate contact with supervisor and utilize funds, staff or equipment?

Unacceptable Superior N/A
☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

Comments: _____

5. **Personnel Management** – Consider how well the employee serves as a role model; provides guidance and opportunities to their staff for their development and advancement; resolves work-related employee problems; assists subordinates in accomplishing their work-related objectives. Does the employee communicate well with subordinates in a clear, concise, accurate, and timely manner and make useful suggestions?

Unacceptable Superior N/A
☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

Comments: _____

PART V - OVERALL PERFORMANCE

Please use this space to describe the overall performance rating. The overall rating should be a reflection of the performance factors, behavioral traits and supervisory factors.

Unacceptable Superior
☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

Comments: _____

SIGNATURES

Supervisor _____ Date: _____

Comments: _____

PART VI - TO THE EMPLOYEE:

I have been advised of my performance ratings. I have discussed the contents of this review with my supervisor. My signature does not necessarily imply agreement. My comments are as follows (optional) (attach additional sheets if necessary):

Signature: _____ Date: _____

APPENDIX 1: ESTABLISHMENT OF GOALS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE COMING YEAR (IF APPLICABLE)

List below the goals, objectives, projects, or special assignments which should be continued and/or completed in the coming year. It is understood that these goals, objectives, etc. are subject to adjustment or change as situations and priorities change. This section should be detached and kept in departmental files so that it can be updated as the situation warrants and so that it can be used to assist the rater at the end of the next evaluation period. Attach a copy of this completed form to the performance evaluation.

GOALS/OBJECTIVES/PROJECT/SPECIAL ASSIGNMENTS

1. _____

2. _____

3. _____

4. _____

Supervisor's Signature: _____

Date: _____

Employee's Signature: _____

Date: _____