

Employee Performance Evaluations | Best Practice Resource Guide

Updated/Distributed by: The Office of Parish and School Human Resources
Archdiocese of Milwaukee – December 2023

This document provides guidelines for conducting employee performance evaluations and provides sample evaluations to be tailored by parishes/schools for their particular use.

Where to Start:

A job description should be the focal point in hiring and in performance evaluations. A well-written job description defines the job and communicates how the position supports the mission of the parish/school. It defines the expectations, responsibilities, educational requirements, and experience needed for the position. Thus, the job description is the ideal outline of expectations against which to measure employee performance.

The Process:

The basic steps leading to the performance evaluation:

1. Employee receives copy of signed job description and a blank performance evaluation to complete and return on specific timeline.
2. Supervisor completes performance evaluation then compiles final document with self and supervisor evaluation.
3. Supervisor and employee meet to discuss final evaluation and goals with a copy of signed evaluation given to employee and original placed in personnel file.

Potential Challenges to the Evaluation Process:

- **Not having a current job description.** It is best practice for employees and supervisors to seek agreement in developing and upgrading job descriptions annually. Note: It is **NOT** suggested to change a job description after an employee has filed a grievance or brought forth a concern. This may be construed as retaliation and may have legal consequences.
- **Supervisor's unwillingness to share constructive feedback.** This can lead to low accountability and poor performance. One way to effectively share constructive feedback is by focusing on behaviors rather than perceived intent. That is, focus on what the employee did or did not do, rather than what this might imply about who the employee is as a person.
- **Employee's unwillingness to sign the performance evaluation.** To address this, indicate that signing indicates that the employee received the evaluation. Employees should always be welcomed to write a response to the performance evaluation, to be included with the performance evaluation in their personnel file.

Performance Evaluation Format:

Performance evaluation categories should be determined based on job duties, expectations, and goals of a particular job and organization. Questions or criteria may include items such as job knowledge, quantity/quality of work, professionalism, communication, teamwork, and dedication to organization values.

There are two main styles of performance evaluations, narrative format & rating scale format.

Narrative style evaluations include open-ended questions that employees and supervisors respond to in paragraph format. For example, on a narrative style evaluation, the category of professionalism may be addressed by a question such as “Is how the person accomplishing the job in terms of adaptability, communication, dependability, initiative, listening skills, interpersonal, and time management?”

The second style, rating scale, offers quantitative information using a scale, usually 1-3 or 1-5, to rate performance. Sometimes, performance ratings do not include numbers but rather qualitative descriptions only (i.e., “satisfactory”). Rating scale criterion should be defined so that employees and supervisors understand what is meant by each category. For example, on a rating scale style evaluation, the category of professionalism may be defined as “the degree to which employee works effectively with others, demonstrates openness, respect and teamwork in interpersonal interactions.” The rating scale is also defined and examples of behaviors in each rating may be included. For example, say a rating scale is 1-3 and is defined as:

- 1 –Expectations of job were not met consistently.
- 2 –Expectations of job were met consistently.
- 3 –Expectations of job were exceeded consistently.

In the example above, a rating scale format evaluation may describe an employee falling in the rating of “2” in the Professionalism category as: “Is polite to all colleagues, responds positively to requests/inquiries, and contributes in team settings and in meetings.”

Narrative and rating scale format options offer different pros and cons. The most common format is a hybrid model utilizing both rating scale and narrative components, as in Sample Performance Appraisal 1 below.

Format	Pros	Cons
Narrative	- Simplest - Provides opportunity for highest specificity	- Not easy to compare between employees or across years for same employee
Rating Scale	- Very easy to understand - Convenient for supervisors and supervisees - Easy to compare year-to-year and employee-to-employee	- May give the illusion of precision because definite numbers are assigned to rater opinions

Helpful Hints:

- Ultimately, nothing on the formal performance evaluation should be a surprise to an employee. A supervisor’s goal should be to give constant and contemporaneous feedback to employees, rather than waiting until the formal evaluation to indicate expectations or failure to meet expectations.
- Make sure any positive feedback on evaluation is earned. If an employee is terminated, performance evaluations may be used to contradict a termination (wrongful termination), e.g., discrimination, retaliation, etc. Therefore, poor performance must be documented in writing, preferable in the formal performance evaluation.

Helpful Hints continued:

- Focus on observed behavior in the formal evaluation. For example, instead of “work is late and inaccurate,” use “the first and third quarter financial reports were late by 2 months and the expenses were not put into the proper chart of accounts.”
- Do not make promises to employees regarding future employment or long-term employment with the parish/school. This may challenge the at-will status.
- It is helpful to have 3 – 5 performance goals that the employee and employer can work on during the next year. As shared in Amazing Parish, objectives help employees link what they are doing with the parish/school. It helps show them how what they do makes a difference in their ministry. These goals should be specific, measurable, attainable, relevant, and time-bound (SMART).

**Sample Performance Evaluations can be found on pages 4-14
of this Best Practice Resource Guide.**

We hope you find this Best Practice Resource Guide to be a helpful tool. Please contact the Office of Parish and School Human Resources with any questions.

Parish and School HR Helpline

414-389-88HR(47) | ParishandSchoolHR@archmil.org

**SAMPLE PERFORMANCE EVALUATION 1 (hybrid narrative/rating scale format, designed for
general use for at-will employees)**

Name = _____

Position Title = _____

Supervisor = _____

Review Period (From/To) = _____

Department = _____

Time in Role = _____

Purpose:

The employee performance appraisal provides a process for the periodic discussion about each employee's accomplishments and challenges that are related to his or her job. It provides a range of factors to help a supervisor and employee organize his or her observations, to assess individual performance in relation to standards for the job, to note aspects of work in which the staff member does well, and to note any areas needing improvement. The appraisal provides an occasion for the staff member and the supervisor to reach/renew a mutual understanding of the job position's objectives and the staff member's role. Work standards can be clarified, training needs discussed, and the effects of changes in the scope of work noted.

Procedure:

1. For self-evaluation purposes, performance review forms will be distributed electronically via [email or payroll system] to all employees on [date, ex: Feb 24].
2. Completed self-evaluation reviews must be submitted to supervisor by [date, ex: March 8.]
3. The supervisor's completed forms must be submitted to the pastor by [date, ex: March 22.]
4. Pastor approval of forms and to schedule employee/manager meetings completed by [date, ex: April 6.]
5. Face-to-face employee/manager review meetings to be completed by [date, ex: May 10.]
6. New annual goals submitted to pastor by [date, ex: May 17].
7. Wage changes submitted to payroll by [date, ex: June 1].
8. Wage changes reflected in payroll system by [date, ex: July 1.]

Scale:

(Evaluate employee on each factor and provide comments on specific performance situations to clarify ratings).

- 1 –Expectations of job were not met consistently.
- 2 –Expectations of job were met consistently.
- 3 –Expectations of job were exceeded consistently.

Performance Review Factors:

Dedication to the Mission – The extent to which an employee understands and embraces the mission of the Parish; displays a positive attitude toward their ministry/position; demonstrates a “service” mindset; is active in and involved with organizational initiatives; demonstrates good stewardship of financial and material resources. Represents their department and the organization favorably.

Rating = _____

Comments/Examples:

Job Knowledge - The degree to which the employee understands the responsibilities, skills and attributes necessary for the position and demonstrates the competencies needed to accomplish them. Demonstrates knowledge of the parish’s/school’s process/system, policies and procedures; OR knowledge of techniques, skills, equipment, procedures, and materials. Displays technical & analytical ability. Demonstrates how the job relates to and supports other positions/departments. Understands their own limitations and strengths.

Rating = _____

Comments/Examples:

Quality of Work - The degree to which the quality of the work produced meets department and organizational standards including accuracy, thoroughness, neatness, and completeness of the work product. Sets and maintains priorities, and deadlines.

Rating = _____

Comments/Examples:

Teamwork/Collaboration - The degree to which employee works effectively with others/their team. Demonstrates openness, respect and professionalism toward others. Works for the good of all. Is polite and responds positively to requests/inquiries. Contributes in cross functional team settings and in meetings.

Rating = _____

Comments/Examples:

Communication - The degree to which the employee listens; promptly and consistently shares relevant information, and is articulate in expressing him/herself both verbally and in writing. If applicable to the position: demonstrates effective presentation skills.

Rating = _____

Comments/Examples:

Cooperation/Personal Character - The degree to which employee is approachable and accessible. Can deal with conflict constructively. Seeks and welcomes feedback. Is truthful in acknowledging mistakes and takes ownership for them. Exhibits gratitude to staff and/or coworkers.

Rating = _____

Comments/Examples:

Dependability/Work Habits - The degree to which employee adheres to attendance and punctuality standards as determined by the needs for the job or department. Plans effectively to meet deadlines. Respects, supports organizational, and department policies. Rebounds from setbacks. Assists with organizational programs and events.

Rating = _____

Comments/Examples:

Initiative/Change Orientation - The degree to which the employee adjusts to multiple demands, shifting priorities and change. Anticipates problems and works to generate workable solutions. Suggests new and/or creative ways to improve job performance. Recognizes potential obstacles and communicates them to leadership.

Rating = _____

Comments/Examples:

Additional Comments:

1. Noteworthy Areas of Strong Performance.

Comment on 2-3 job accomplishments or behaviors that are considered major strengths.

2. Areas of Improvement.

Comment on 2-3 job responsibilities or behaviors that require development.

3. Final/Summary Comments:

A copy of the job description is attached and has been:

_____ Reviewed with the employee and there is no change.

_____ Updated and discussed with employee.

The employee's signature indicates only that he/she has seen this evaluation and does not indicate agreement or disagreement with the evaluation.

Employee Signature = _____

Date _____

Supervisor Signature = _____

Date _____

Pastor Signature = _____

Date _____

SAMPLE PERFORMANCE EVALUATION 2 (rating scale format including defined behaviors in rubric, originally designed for school support staff)

Name = _____

Position Title = _____

Supervisor = _____

School Year = _____

Department = _____

Time in Role = _____

Performance Criteria

(Please see Support Staff Evaluation Rubric)

Performance standards are either expressed or implied as an integral part of support staff job descriptions/responsibilities.

Performance Level

(Please check appropriate box)

4 = Significant Strength

3 = Proficient

2 = Basic

1 = Area of Concern

	4	3	2	1
1. DEPENDABILITY (demonstrates commitment to demands of the job; meets deadlines)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. ATTITUDE (flexible, respectful, cooperative)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. INITIATIVE (self-motivated, resourceful; independent)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4. JUDGEMENT
(discretion, confidentiality)

5. FOLLOWS CHAIN OF COMMAND

6. TEAMWORK

7. JOB KNOWLEDGE

8. PROFESSIONAL GROWTH

9. ATTENDANCE Satisfactory Unsatisfactory

Employee Comments:

Supervisor Comments:

A copy of the job description is attached and has been:
_____ Reviewed with the employee and there is no change.
_____ Updated and discussed with employee.

The employee's signature indicates only that he/she has seen this evaluation and does not indicate agreement or disagreement with the evaluation.

Employee Signature = _____ Date _____

Supervisor Signature = _____ Date _____

Pastor Signature = _____ Date _____

Performance Evaluation Rubric

<u>Job Standard</u>	<u>Significant Strength</u>	<u>Proficient</u>	<u>Basic</u>	<u>Area of Concern</u>
1) Dependability	<ul style="list-style-type: none"> * Gives administration advanced written notice when absence is anticipated * Consistently completes tasks and meets deadlines, sometimes in advance of schedule * Initiates communication with supervisor re: status of ongoing or unfinished projects 	<ul style="list-style-type: none"> * Prepared to start work on time * Informs administration of absence in a timely manner * Completes tasks and meets deadlines 	<ul style="list-style-type: none"> * Arrives at work on time * Follows sub-line and/or emergency absentee procedures * Generally completes tasks on time 	<ul style="list-style-type: none"> * Frequently arrives to work late or leaves early * Fails to notify administration of tardiness or absence * Assigned tasks/projects are late or incomplete
2) Attitude <ul style="list-style-type: none"> * flexible * respectful * cooperative 	<ul style="list-style-type: none"> * Volunteers for unanticipated assignment * Engages in unplanned activities when scheduled is unexpectedly open 	<ul style="list-style-type: none"> * Anticipates schedule changes and adjusts activities accordingly * Independently identifies where assistance is needed and provides it 	<ul style="list-style-type: none"> * When given direction accepts unanticipated scheduled assignment * Upon request will assist students, co-workers and supervisors 	<ul style="list-style-type: none"> * Is unavailable for reassignment when schedule is unexpectedly open * Refuses or argues about reassignment * Displays negative attitude toward assisting others
3) Initiative <ul style="list-style-type: none"> * self-motivated * resourceful * independent 	<ul style="list-style-type: none"> * Anticipates new ideas and assists where needed * Suggests solutions and ideas to supervisor/administration 	<ul style="list-style-type: none"> * Asks questions to improve job performance or secure resources 	<ul style="list-style-type: none"> * Sometimes appears indifferent towards work assignments * Make improvements only when directed 	<ul style="list-style-type: none"> * Carries out tasks half-heartedly or reluctantly * Disregards supervisor's suggestions or requires continual monitoring
4) Judgment <ul style="list-style-type: none"> * discretion * confidentiality 	<ul style="list-style-type: none"> * Protects confidentiality of student/family/colleague/others * Seeks out information related to law or school policy and rules 	<ul style="list-style-type: none"> * Implements all school guidelines for confidentiality 	<ul style="list-style-type: none"> * Practices confidentiality/follows 'need to know' rules * Reports violations of law or school policy to administration 	<ul style="list-style-type: none"> * Discloses confidential information * Ignores violations of law/school policy

<p>5) Follows chain of command when communicating with coworkers, teachers, other professional staff and administration.</p>	<ul style="list-style-type: none"> * Differentiates between decisions requiring admin approval and those within the employee's role * Initiates and responds to contact with supervising teacher or others by written or oral means * Volunteers to assist others in tasks 	<ul style="list-style-type: none"> * Appropriately seeks out direction from supervisor * Independently completes forms and reports accurately * Responds to all requests for info 	<ul style="list-style-type: none"> * Follows supervisor's directions * With supervision, can complete forms required by district in a timely manner * Inconsistently responds to written or verbal requests for information 	<ul style="list-style-type: none"> * Ignores supervisor directions * Incomplete or late task completion * Ignores requests by supervisors or others for written or verbal information
<p>6) Teamwork</p>	<ul style="list-style-type: none"> * Works well with others, including coworkers, administration and students * Demonstrates excellent interpersonal skills 	<ul style="list-style-type: none"> * Congenial and cooperative * Ability to work well with others 	<ul style="list-style-type: none"> * Cooperates with others when required * Limited interpersonal skills 	<ul style="list-style-type: none"> * Does not work well with others * Uses negative tone of voice, inappropriate volume and pitch, or demeaning remarks when speaking
<p>7) Job Knowledge</p>	<ul style="list-style-type: none"> * Very good knowledge and skills to perform job * Understands all phases of work with little or no coaching 	<ul style="list-style-type: none"> * Sufficient knowledge and skills to perform job * Usually quick to understand & learn 	<ul style="list-style-type: none"> * Sufficient knowledge and skills to perform job at a basic level * Requires frequent instruction & explanation 	<ul style="list-style-type: none"> * Lacks knowledge and skills about work duties * Serious knowledge retention problems * Requires constant instruction & explanation
<p>8) Professional Growth</p>	<ul style="list-style-type: none"> * Attends training offered by district or school * Furthers education through college courses or conferences 	<ul style="list-style-type: none"> * Attends most offered trainings * Demonstrates interest in expanding skill set for the job 	<ul style="list-style-type: none"> * Attends training as required by administration * Little interest in expanding skills beyond basics needed for the job 	<ul style="list-style-type: none"> * Does not attend training or other in-service opportunities
<p>Overall Evaluation</p>	<ul style="list-style-type: none"> * Performance is excellent overall in most categories 	<ul style="list-style-type: none"> * Performing at above average in most categories 	<ul style="list-style-type: none"> * Performing to minimum required in most categories 	<p>Substandard/unacceptable performance, requires immediate improvement</p>

SAMPLE PERFORMANCE EVALUATION 3 (hybrid narrative/rating scale format including qualitative performance ratings and goal-setting section, originally designed for school non-instructional staff)

Name = _____

Position Title = _____

Supervisor = _____

School Year = _____

Department = _____

Time in Role = _____

Instructions: Both the Non-Instructional Staff and Direct Supervisor read the descriptions for each performance category. They each check the appropriate rating and provide any relevant comments. They then meet to discuss their ratings. Final ratings are to be determined by the Supervisor. Staff member and Supervisor jointly complete the final section indicating strengths and goals. Both parties sign and date the Performance Evaluation.

Performance Ratings:

OUTSTANDING: Performance is consistently and substantially above requirements in all areas; consistently exceptional performance over evaluation period. Few employees will receive this rating.

EXCEEDS REQUIREMENTS: Performance is clearly above requirements. Performance exceeds expectations of supervisor and requirements of job description. Normally few new employees will receive this rating.

MEETS REQUIREMENTS: Performance is consistently good. This is the usual level of performance for most new hires. It is competent and effective performance relative to experience in the position.

NEEDS IMPROVEMENT: Performance does not fully meet requirements.

UNSATISFACTORY: Performance is unsatisfactory in critical areas.

Criterion	Outstanding	Exceeds Requirements	Meets Requirements	Needs Improvement	Unsatisfactory
Quality: Produces thorough, accurate and consistent work. Applies good judgment.					
Quantity: Produces required amount of work. Consistently completes fair share of the workload. Turnaround time consistently meets expectations.					

<p>Demonstrates effective follow-through on short- and long-term tasks. Maintains confidentiality.</p>					
<p>Communication: Communicates effectively with supervisor, co-workers, and members of the community. Listens well to instructions. Provides timely status updates as appropriate. Maintains confidentiality. Asks appropriate questions when uncertain.</p>					
<p>Attendance/Punctuality: Maintains satisfactory attendance. Arrives and departs as scheduled. Schedules days off in accordance with policy. Adheres to time allotted for lunch and break periods.</p>					

Goals Accomplished during the current review period:

- 1.
- 2.
- 3.

Goals for next review period:

- 1.
- 2.
- 3.

Employee Comments:

1. What would you like to see changed and /or improved about your job?
2. In what areas do you feel you need more in-service / training opportunities to do your job?
3. In what ways are you reflecting the mission and values of our school?
4. Other comments/ thoughts:

Supervisor Comments:

A copy of the job description is attached and has been:

_____ Reviewed with the employee and there is no change.

_____ Updated and discussed with employee.

The employee's signature indicates only that he/she has seen this evaluation and does not indicate agreement or disagreement with the evaluation.

Employee Signature = _____

Date _____

Supervisor Signature = _____

Date _____

Pastor Signature = _____

Date _____