



**Supervisory/Managerial Personnel
Annual Performance Review**

Name: _____ **Location:** _____

Date of Hire: _____ **Job Title:** _____

Supervisor: _____ **Job Title:** _____

This performance review form is designed to facilitate a candid and objective conversation between an employee in a managerial role and his/her supervisor to discuss work performance, identify areas of strength and weakness, provide direction for growth and improvement and reach a mutual understanding between the employee and supervisor about goals and expectations for future performance, responsibilities and expectations. The supervisor is to evaluate the employee in terms of fit for the position as well as assess the potential for the employee's future success in the role.

Performance Rating Scale:

Meets Expectations: Work performance consistently meets job expectations
Needs Improvement: Work performance meets some, but not all, job expectations

Leadership

- Effectively leads, inspires, motivates, develops and directs staff.
- Acts as a positive role model for others.
- Assures a positive work environment.
- Demonstrates commitment to foster and build unity.
- Maintains focus on situations and finding solutions rather than blaming others.
- Works through conflicts and coaches others to work through and resolve conflicts.
- Builds trust and strong working relationships with internal and external Archdiocesan departments, parishes, schools, through integrity, honesty, confidentiality, and consistency in actions, words and behavior.
- Demonstrates ethical practices by following Archdiocese policies, upholding teachings of the Roman Catholic Church and being accountable.
- Commits himself/herself and teaches staff to uphold Archbishop's Pastoral Values.
- Uses positive feedback to motivate and feedback for improvement to help others improve performance.
- Maintains composure and a constructive attitude, especially in difficult situations or conversations.
- Demonstrates willingness to make necessary but difficult decisions that may not be received well.

Meets Expectations Needs Improvement

Service

- Appropriately represents Archdiocese with a service-oriented and positive demeanor, so that those served feel that their questions, concerns and needs are addressed in the best manner possible.
- Works collaboratively and promotes teamwork
- Takes responsibility for constituent satisfaction as a priority for himself/herself and for his/her team.
- Listens attentively and respectfully, maintaining focus on the needs of the person even in challenging situations.
- Does not demean, bully, or talk over others during meetings, discussions, disagreements or difficult conversations.
- Demonstrates consideration for others feelings, opinions, and time.
- Removes barriers to constituent service such as bottlenecks, redundancies, and outdated processes and procedures.

Meets Expectations Needs Improvement

Stewardship

- Manages budgets well.
- Is fiscally responsible.
- Avoids waste in resource allocation.
- Helps others understand good stewardship of resources.

Meets Expectations Needs Improvement

Communication

- Is able to inform, instruct, listen, respond and express thoughts and ideas clearly, professionally and appropriately, both orally and in writing.
- Communicates easily with all levels of staff and those he/she supports throughout the Archdiocese.
- Communicates problems, issues, and ideas with clarity, asking questions when not comprehending facts, documentation or timelines.
- Is able to tailor communication style, delivery and media for each level of audience, ensuring that the audience understands the message.
- Uses respectful and appropriate language, good grammar and good spelling in oral and written communication.
- Presents well in front of a group.

Meets Expectations Needs Improvement

Judgment and Decision-Making

- Effectively analyzes problems, determines appropriate action for solutions and exhibits timely and decisive action.
- Judges and makes decisions and recommendations with good, sound reasoning and according to Church teaching and ethical practices/principles.
- Weighs both sides of issues and/or costs and benefits to reach most appropriate decisions.
- Seeks appropriate consultation in making decisions.
- Analyzes and anticipates obstacles in order to identify best solutions.
- Breaks down problems into component parts to identify core issues.
- Exercises careful deliberation and avoids rash judgment especially when consequences may be serious.
- Advises upper management of current or anticipated problems.

Meets Expectations Needs Improvement

Staff Management

- Develops a solid team within area of responsibility.
- Fosters and rewards good teamwork.
- Effectively directs staff.
- Successfully matches staff abilities to job requirements.
- Helps staff and others meet both performance expectations and developmental goals through ongoing feedback and coaching.
- Analyzes developmental needs and selects coaching, assignment of projects and tasks, training and skill-building opportunities for improvement of team.
- Fosters continuous improvement, continuous learning, and continuous formation of staff.
- Resolves conflicts in team and works to minimize situations of potential conflict.

Meets Expectations Needs Improvement

Excellence

- Creates strategies, values, processes and methods that help guide activities and decisions for achieving excellence.
- Understands constituents needs and anticipates important changes that will affect service to and support of programs and constituents. **Successfully matches staff abilities to job requirements.**
- Awareness of developments in technology, teaching tools, and materials that will help deliver and maintain excellence in processes, procedures, service and value.
- Values staff, co-workers and others, committing to their satisfaction, development, and well-being.
- Inspires and motivates staff and others, encouraging involvement, development and learning, innovation and creativity by all employees.
- Identifies and/or takes advantage of opportunities to affect significant change

Meets Expectations Needs Improvement

STRENGTHS:

WEAKNESSES:

OVERALL PERFORMANCE: Meets Expectations Needs Improvement

GOAL EVALUATION FOR PREVIOUS REVIEW PERIOD

Goals from previous review period: Evaluate how effectively goals were achieved. Which goals were achieved well? Which goals, if any, were not achieved at established level? What factors affected goal achievement.

Goal 1	Met (Y/N)	Reason(s) for not meeting goals
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Goal 2		
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Goal 3		
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Additional Goals:

GOALS AND TRAINING PLAN FOR NEXT REVIEW PERIOD

Please identify three specific goals to be achieved, including expected outcomes and timelines/deadlines for completion/meeting goals. Indicate any action to be taken by the supervisor in assisting the employee in achieving these goals. Additional goals may also be noted.

Goal 1	Expected Outcome	To be completed by
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Goal 2

Goal 3

Additional Goals:

Development/Training Plan for next review period.

(Identify any general areas for development and training, specific courses, seminars or other actions to be taken and timelines/deadlines for completing the development/training plan.)

Development/Training Needs	Course of Action	To be completed by
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EMPLOYEE COMMENTS: Employee may use this space to comment on review.

My signature acknowledges that the contents of this review have been discussed with me; it does not imply agreement or disagreement.

Employee Signature

Date

Supervisor Signature

Date

Sr. Director/Person in Charge Signature

Date

Rev 3/2017