



# Employee Evaluation Form

## NOTES TO REVIEWERS

The Employee Evaluation Form for 2024-2025 is more detailed than last year's form. The descriptions under Performance Categories have, in most cases, been expanded to assist you in your reflections on the employee's performance, as well as to help guide your discussions during the formal review meeting.

Also incorporated, at the very outset, is a section related to the job description. Since performance should always relate to the duties of a job, it's important to keep the job description updated. This is only fair to the employee, since he or she deserves to know what they're being evaluated on. It's very common for jobs to evolve over time, so that what the job consisted of originally is no longer what the job currently covers. Please list any areas that have changed and, where appropriate, provide an updated job description. Clarity of expectations is a prerequisite for high performance.

Also included is a section related to goals. Every job, and every department, should have defined goals which are updated every year. High performing organizations set individual, departmental, and organizational goals to drive continuous improvement, and related also to the overall mission of the organization. In our diocese, the overall mission is to implement the Bishop's priorities faithfully and in a manner reflective of how he would accomplish them, and ultimately to advance the mission of the Church. This requires ongoing reflection both personally and organizationally, which is why there is a new section focusing on goals and objectives this year.

Lastly, the scale used for the employee evaluation has evolved to make the levels clearer to both supervisor and employee.

It is essential that you devote adequate time and effort to a fair and impartial review, and an honest discussion with your employee. One of the primary reasons for employee dissatisfaction and turnover is the failure to provide timely and regular feedback, both positive and negative. Please use this opportunity well!

### NUMERICAL SCALE FOR EMPLOYEE EVALUATIONS

| Points | Level                 | Description  |
|--------|-----------------------|--|
| 5      | Exceptional           | Performance is consistently exceptional and significantly exceeds job requirements.  |
| 4      | Highly Effective      | Performance repeatedly exceeds job requirements.   |
| 3      | Proficient            | Performance satisfies job requirements.  |
| 2      | Inconsistent          | Performance meets a few, but not all job requirements.   |
| 1      | Unsatisfactory        | Performance repeatedly fails to meet the minimum job requirements; the employee lacks the knowledge or skills required or fails to use the necessary skills. |
| N/A    | New or Not Applicable | Employee has not been in the role long enough to have demonstrated the necessary elements of the role and will be reviewed at a later agreed upon time.      |



## Employee Evaluation Form

| I. EMPLOYEE INFORMATION  |   |                       |
|--|---|-----------------------|
| Employee Name  | Job Title   |                       |
| Supervisor/Reviewer  | Review Period<br>From: To:  |                       |
| II. CURRENT RESPONSIBILITIES   |   |                       |
| Attach job description, noting any significant changes since last review below.  |   |                       |
|  |   |                       |
| III. CORE VALUES AND OBJECTIVES  |   |                       |
| PERFORMANCE CATEGORY   | RATING  | COMMENTS AND EXAMPLES |
| <b>Please note: Categories rated anything except "Proficient" REQUIRE substantiation by detailed, unambiguous examples.</b>  |   |                       |
| <b>Quality/Quantity of Work:</b><br><i>Work is completed accurately (few or no errors), efficiently and within deadlines with minimal supervision. Work is consistent. Performs full range of duties.</i>  | <input type="checkbox"/> Exceptional - 5<br><input type="checkbox"/> Highly Effective - 4<br><input type="checkbox"/> Proficient - 3<br><input type="checkbox"/> Inconsistent – 2<br><input type="checkbox"/> Unsatisfactory – 1<br><input type="checkbox"/> New or N/A |                       |
| <b>Knowledge of Job:</b><br><i>Shows ability to learn and apply new skills. Requires minimal supervision. Displays understanding of roles and responsibilities. Possesses required knowledge to competently perform the job.</i>                 | <input type="checkbox"/> Exceptional - 5<br><input type="checkbox"/> Highly Effective - 4<br><input type="checkbox"/> Proficient - 3<br><input type="checkbox"/> Inconsistent – 2<br><input type="checkbox"/> Unsatisfactory – 1<br><input type="checkbox"/> New or N/A |                       |
| <b>Attendance &amp; Punctuality:</b><br><i>Reports for work on time. Provides advance notice of need for absence. Adheres to diocesan guidelines for attendance and PTO. Arrives to meetings on time and prepared.</i>                           | <input type="checkbox"/> Exceptional - 5<br><input type="checkbox"/> Highly Effective - 4<br><input type="checkbox"/> Proficient - 3<br><input type="checkbox"/> Inconsistent – 2<br><input type="checkbox"/> Unsatisfactory – 1<br><input type="checkbox"/> New or N/A |                       |
| <b>Reliability/Dependability:</b><br><i>Consistently performs at a high level; manages time and workload effectively to meet responsibilities. Meets required deadlines. Holds self accountable for assigned tasks. Works to full potential.</i> | <input type="checkbox"/> Exceptional - 5<br><input type="checkbox"/> Highly Effective - 4<br><input type="checkbox"/> Proficient - 3<br><input type="checkbox"/> Inconsistent – 2<br><input type="checkbox"/> Unsatisfactory – 1<br><input type="checkbox"/> New or N/A |                       |



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| III. CORE VALUES AND OBJECTIVES, continued  |   |                       |
|---|---|-----------------------|
| PERFORMANCE CATEGORY  | RATING  | COMMENTS AND EXAMPLES |
| <b>Communication Skills:</b><br><i>Written and oral communications are clear, organized and effective; listens and comprehends well. Communicates effectively and appropriately with customers, coworkers, and supervisor.</i>  | <input type="checkbox"/> Exceptional - 5<br><input type="checkbox"/> Highly Effective - 4<br><input type="checkbox"/> Proficient - 3<br><input type="checkbox"/> Inconsistent – 2<br><input type="checkbox"/> Unsatisfactory – 1<br><input type="checkbox"/> New or N/A |                       |
| <b>Judgment &amp; Decision-Making:</b><br><i>Proficiency in analyzing facts. Makes thoughtful, well-reasoned decisions; exercises good judgment, resourcefulness, and creativity in problem-solving.</i>  | <input type="checkbox"/> Exceptional - 5<br><input type="checkbox"/> Highly Effective - 4<br><input type="checkbox"/> Proficient - 3<br><input type="checkbox"/> Inconsistent – 2<br><input type="checkbox"/> Unsatisfactory – 1<br><input type="checkbox"/> New or N/A |                       |
| <b>Initiative &amp; Flexibility:</b><br><i>Shows initiative, often seeking out additional responsibility. Identifies problems and solutions; thrives on new challenges and adjusts to unexpected changes. Looks for ways to improve quality. Willingness to take more responsibilities.</i> | <input type="checkbox"/> Exceptional - 5<br><input type="checkbox"/> Highly Effective - 4<br><input type="checkbox"/> Proficient - 3<br><input type="checkbox"/> Inconsistent – 2<br><input type="checkbox"/> Unsatisfactory – 1<br><input type="checkbox"/> New or N/A |                       |
| <b>Cooperation &amp; Teamwork:</b><br><i>Respectful of colleagues when working with others and makes valuable contributions to help the team. Fosters team collaboration. Includes others in team projects. Demonstrates fairness towards co-workers.</i>                                   | <input type="checkbox"/> Exceptional - 5<br><input type="checkbox"/> Highly Effective - 4<br><input type="checkbox"/> Proficient - 3<br><input type="checkbox"/> Inconsistent – 2<br><input type="checkbox"/> Unsatisfactory – 1<br><input type="checkbox"/> New or N/A |                       |
| <b>Customer Service Skills</b><br><i>Asks questions to identify needs. Quickly responds to help requests. Resolves problems early and quickly. Predicts other's needs and meets or surpasses them.</i>  | <input type="checkbox"/> Exceptional - 5<br><input type="checkbox"/> Highly Effective - 4<br><input type="checkbox"/> Proficient - 3<br><input type="checkbox"/> Inconsistent – 2<br><input type="checkbox"/> Unsatisfactory – 1<br><input type="checkbox"/> New or N/A |                       |
| <b>Catholic Identity</b><br><i>Treats colleagues with appropriate respect; displays empathy for others; acts in a manner consistent with the values of the Catholic Faith; reflects Christian charity and humility</i>  | <input type="checkbox"/> Exceptional - 5<br><input type="checkbox"/> Highly Effective - 4<br><input type="checkbox"/> Proficient - 3<br><input type="checkbox"/> Inconsistent – 2<br><input type="checkbox"/> Unsatisfactory – 1<br><input type="checkbox"/> New or N/A |                       |



## Employee Evaluation Form

### IV. JOB-SPECIFIC PERFORMANCE CRITERIA

| PERFORMANCE CATEGORY   | RATING  | COMMENTS AND EXAMPLES |
|--|---|-----------------------|
| <b>Training &amp; Development:</b><br><i>Continually seeks ways to strengthen performance and regularly monitors new developments in field of work</i> | <input type="checkbox"/> Exceptional - 5<br><input type="checkbox"/> Highly Effective - 4<br><input type="checkbox"/> Proficient - 3<br><input type="checkbox"/> Inconsistent – 2<br><input type="checkbox"/> Unsatisfactory – 1<br><input type="checkbox"/> New or N/A |                       |

### V. PERFORMANCE GOALS

Discuss accomplishments/areas of excellence. *Please be specific.*

Discuss weaknesses/areas of improvement. *Please be specific.*

Set objectives and outline steps to improve in problem areas or further employee development.

Develop goals for next review period.

### VI. OVERALL RATING

Total numerical score from the above categories:

|  |   |   |   |   |
|--|---|---|---|---|
| <input type="checkbox"/> <b>EXCEPTIONAL</b><br><i>Performance is consistently exceptional and significantly exceeds job requirements</i> | <input type="checkbox"/> <b>HIGHLY EFFECTIVE</b><br><i>Performance repeatedly exceeds job requirements.</i> | <input type="checkbox"/> <b>PROFICIENT</b><br><i>Performance repeatedly satisfies job requirements.</i> | <input type="checkbox"/> <b>INCONSISTENT</b><br><i>Performance meets a few, but not all job requirements.</i> | <input type="checkbox"/> <b>UNSATISFACTORY</b><br><i>Performance repeatedly fails to meet the minimum job requirements; the employee lacks the knowledge or skills required or fails to use the necessary skills.</i> |
| Score: 55-60   | Score: 41-54  | Score: 20-40  | Score: 6 - 19   | Score: 0-5  |



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**VI. SUPERVISOR COMMENTS ON PERFORMANCE**

Comment on the employee's overall performance.

**VI. EMPLOYEE COMMENTS (OPTIONAL)**

**VII. ACKNOWLEDGEMENT**

I acknowledge that I have had the opportunity to discuss this performance evaluation with my manager/ supervisor and I have received a copy of this evaluation.

Employee Signature:

Date:

Reviewer Signature:

Date: