



# Episcopal Diocese of Newark PERFORMANCE APPRAISAL

## MANAGEMENT & STAFF POSITIONS

STAFF MEMBER NAME:		POSITION TITLE:		DEPARTMENT:	
DATE OF THIS REVIEW:	DATE OF LAST REVIEW:	YEARS IN CURRENT POSITION:	REPORTS TO (TITLE):		

**Note:** An approved copy of this form should be retained in the departmental file, a copy should be given to the employee, and a copy should be sent to the Human Resources Representative. Job evaluations should tie to the requirements outlined below.

POSITION TITLE:		DEPARTMENT:		EMPLOYEE NAME:	
REPORTS TO (TITLE):			HIRE DATE:		LAST REVIEW DATE:
EVALUATION PERIOD:	FROM:	TO:	EXEMPT		NON-EXEMPT

**Note:** An approved copy of this form should be retained in the departmental file, a copy should be given to the employee, and a copy should be sent to the Human Resources Coordinator.

### CORE RESPONSIBILITIES

Please list major responsibilities of this position and indicate next to each core responsibility if it is an \*essential function of the job.

<p style="text-align: center;"><i>Example:</i></p> <p><i>Initiates the development and implementation of an annual budget in order to ensure the ability to monitor overall financial performance of the department and make timely adjustments to achieve operating financial targets.</i></p>	<p style="text-align: center;"><i>Ratings</i></p> <p><b>Exceptional Performance</b> <i>Indicates performance of exceptionally high quality that exceeds the requirements of the position.</i></p> <p><b>Highly Valued Performance</b> <i>Indicates performance of consistently high quality that meets the requirements of the position. Performs at the level expected of a fully qualified and experienced employee.</i></p> <p><b>Improvement Needed</b> <i>Indicates performance that falls below the requirements of the position</i></p>						
<p>Any rating of <b>Improvement Needed</b> must be addressed in the employee's Performance Development Plan on page 6.</p>							
<p>1. Describe responsibility: _____</p> <p style="text-align: right;">* Essential Function <input checked="" type="checkbox"/></p>	<table style="width: 100%; border: none;"> <tr> <td style="width: 50%;">Noteworthy Performance Accomplishments/Remarks (if applicable)</td> <td style="width: 50%;">Exceptional Performance <input type="checkbox"/></td> </tr> <tr> <td></td> <td>Highly Valued Performance <input type="checkbox"/></td> </tr> <tr> <td></td> <td>Improvement Needed <input type="checkbox"/></td> </tr> </table>	Noteworthy Performance Accomplishments/Remarks (if applicable)	Exceptional Performance <input type="checkbox"/>		Highly Valued Performance <input type="checkbox"/>		Improvement Needed <input type="checkbox"/>
Noteworthy Performance Accomplishments/Remarks (if applicable)	Exceptional Performance <input type="checkbox"/>						
	Highly Valued Performance <input type="checkbox"/>						
	Improvement Needed <input type="checkbox"/>						

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<p>2. Describe responsibility:</p> <p align="right"><b>* Essential Function</b> <input checked="" type="checkbox"/></p>	<p>Noteworthy Performance Accomplishments/Remarks (if applicable)</p> <p>Exceptional Performance <input type="checkbox"/> Highly Valued Performance <input type="checkbox"/> Improvement Needed <input type="checkbox"/></p>
<p>3. Describe responsibility:</p> <p align="right"><b>* Essential Function</b> <input checked="" type="checkbox"/></p>	<p>Noteworthy Performance Accomplishments/Remarks (if applicable)</p> <p>Exceptional Performance <input type="checkbox"/> Highly Valued Performance <input type="checkbox"/> Improvement Needed <input type="checkbox"/></p>
<p>4. Describe responsibility:</p> <p align="right"><b>* Essential Function</b> <input checked="" type="checkbox"/></p>	<p>Noteworthy Performance Accomplishments/Remarks (if applicable)</p> <p>Exceptional Performance <input type="checkbox"/> Highly Valued Performance <input type="checkbox"/> Improvement Needed <input type="checkbox"/></p>
<p>5. Describe responsibility:</p> <p align="right"><b>* Essential Function</b> <input checked="" type="checkbox"/></p>	<p>Noteworthy Performance Accomplishments/Remarks (if applicable)</p> <p>Exceptional Performance <input type="checkbox"/> Highly Valued Performance <input type="checkbox"/> Improvement Needed <input type="checkbox"/></p>
<p>6. Describe responsibility:</p> <p align="right"><b>* Essential Function</b> <input checked="" type="checkbox"/></p>	<p>Noteworthy Performance Accomplishments/Remarks (if applicable)</p> <p>Exceptional Performance <input type="checkbox"/> Highly Valued Performance <input type="checkbox"/> Improvement Needed <input type="checkbox"/></p>
<p>7. Describe responsibility:</p> <p align="right"><b>* Essential Function</b> <input checked="" type="checkbox"/></p>	<p>Noteworthy Performance Accomplishments/Remarks (if applicable)</p> <p>Exceptional Performance <input type="checkbox"/> Highly Valued Performance <input type="checkbox"/> Improvement Needed <input type="checkbox"/></p>
<p>8. Describe responsibility:</p> <p align="right"><b>* Essential Function</b> <input checked="" type="checkbox"/></p>	<p>Noteworthy Performance Accomplishments/Remarks (if applicable)</p> <p>Exceptional Performance <input type="checkbox"/> Highly Valued Performance <input type="checkbox"/> Improvement Needed <input type="checkbox"/></p>

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<b>9.</b> Describe responsibility:  <p align="right">* <b>Essential Function</b> <input type="checkbox"/></p>	Noteworthy Performance Accomplishments/Remarks (if applicable)	Exceptional Performance <input type="checkbox"/> Highly Valued Performance <input type="checkbox"/> Improvement Needed <input type="checkbox"/>
<b>10.</b> Describe responsibility:  <p align="right">* <b>Essential Function</b> <input type="checkbox"/></p>	Noteworthy Performance Accomplishments/Remarks (if applicable)	Exceptional Performance <input type="checkbox"/> Highly Valued Performance <input type="checkbox"/> Improvement Needed <input type="checkbox"/>
<b>Performs other related duties as assigned</b>		

**Disclaimer**

The above statements are intended to describe the general nature and level of work being performed by people assigned to this classification. They are not to be construed as an exhaustive list of all responsibilities, duties, and skills required of personnel so classified. All personnel may be required to perform duties outside of their normal responsibilities from time to time, as needed.

**Additional information**

HR use only	
Management? (Yes/No)	
E/NE status	
Last revised	11/07

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**CORE COMPETENCIES**

At The Diocese of Newark we are dedicated to our core values – **Respect, Integrity, Compassion, and Excellence**. These competencies are **essential** components of job performance:

	<b>Improvement Needed</b>	<b>Demonstrates Competency</b>	<b>Exceptional Performance</b>
<ul style="list-style-type: none"> <li>Follows all Diocesan, National Church, and Regulatory requirements as appropriate</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Understands, promotes and adheres to all Diocesan standards of business conduct as exhibited by: judgment, business ethics, and integrity.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Possesses the combination of job, technical, and Diocesan knowledge needed to meet performance expectations of this position.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Shows respect and demonstrates courtesy in all interactions.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Understands and demonstrates sensitivity to cultural differences.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Encourages and fosters cooperation and teamwork among staff to insure excellent customer service.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Practices and promotes effective conflict resolution.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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	<b>Improvement Needed</b>	<b>Demonstrates Competency</b>	<b>Exceptional Performance</b>
<ul style="list-style-type: none"> <li>• Responds by telephone and e-mail in a courteous and professional manner. Returns calls and responds to e-mails promptly.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>• Communicates effectively and courteously with other staff members, parish leadership, and other people as appropriate</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>• Takes ownership and responds promptly to mistakes. Investigates complaints to improve quality of service.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>• Demonstrated commitment to achieving superior work performance through: attitude, dependability, quality of work, initiative, problem solving, flexibility and adaptability, personal appearance, appearance of work area.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>• Demonstrates regularity and punctuality in reporting to work, returning from breaks, and working assigned hours</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>• Projects and maintains a positive attitude</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Any rating stating “Improvement Needed” must be addressed in the Performance Development Plan**

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**MANAGEMENT & STAFF POSITIONS - STRATEGIC MANAGEMENT COMPETENCIES**

These competencies apply to all levels of management. They describe what is necessary to support the strategic needs of The Diocese of Newark and to develop a workforce engaged in our mission and goals. (Write "NA" next to factors that do not apply to this position/)

	Improvement Needed	Demonstrates Competency	Exceptional Performance
<b>RESPECT</b>			
– Upholds the mission, values and goals of the Diocese	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
– Is truthful and straightforward in dealings with others	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
– Creates an environment of acceptance and respect in the workplace	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>INTEGRITY</b>			
– Bases leadership practices on The Diocese's Code of Institutional ethics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
– Builds trust by following through on commitments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>COMPASSION</b>			
– Promotes productive exchanges of information and opinion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
– Demonstrates and fosters respect and appreciation for all regardless of background, race, age, gender, sexual orientation, disability, lifestyle, perspectives, or interests.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>EXCELLENCE</b>			
– Defines and sets standards for high quality service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
– Seeks feedback to identify and exceed the expectations of all customers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>POSITIVE &amp; OPTIMISTIC</b>			
– Displays a winning attitude and encourages others to identify and pursue opportunities for improvement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
– Makes decisions and takes action to support critical strategic issues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>CHANGE AGENT</b>			
– Responsive to changing priorities in the Diocese, National Church and operational requirements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
– Demonstrates flexibility to adapt to new challenges.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>ACCOUNTABILITY</b>			
– Accepts responsibility and is results driven	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
– Provides clear objectives, defines metrics for results and drives a sense of urgency.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>EFFICIENT</b>			
– Manages time and staff in an effective manner to achieve optimum resource utilization.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
– Possesses analytical skills to ensure decisions are based on sound data.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
– Effective at managing budget and expenses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
– Effective at planning, organizing, and executing position responsibilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>INNOVATIVE</b>			
– Encourages and demonstrates creative and innovative thinking.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
– Rewards risk taking and fosters an environment of ownership and entrepreneurial attitudes.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>COMMUNICATION</b>			
– Speaks and writes clearly and in a well-organized manner.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
– Encourages open communication from staff and actively listens.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
– Communicates important organizational information to staff.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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**PERFORMANCE APPRAISAL SUMMARY  
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**OVERALL PERFORMANCE RATING**

To determine overall performance rating, please review each of the four evaluation areas: Core Responsibilities, Core Competencies, Customer Service Competencies & Strategic Management Competencies.

	<b>Improvement Needed</b> <input type="checkbox"/>	<b>Highly Valued Performance</b> <input type="checkbox"/>	<b>Exceptional Performance</b> <input type="checkbox"/>
<b>DELEGATION &amp; EMPOWERMENT</b>			
- Provides clear direction			
- Ensures employees have the necessary authority, latitude, and resources to take action.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Encourages relevant decision making at all levels of the organization.			
- Commits people to action. Translates vision and meaning into reality			
<b>TEAM BUILDING</b>			
- Encourages collaborative relationships at all levels and participates in team projects.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>STAFF DEVELOPMENT</b>			
- Recruits and retains high performing staff			
- Effectively utilizes resources and abilities of individuals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Provides challenging assignments and coaching			

**Any rating stating "Improvement Needed" must be addressed in the Performance Development Plan**

**APPRAISER'S COMMENTS:**

**PERFORMANCE GOALS:** Define 3 to 6 specific and measurable goals:

**PERFORMANCE IMPROVEMENT/DEVELOPMENT PLAN:**

(List goals and objectives for the upcoming evaluation period, Goals are long-range targets; objectives are the steps taken to achieve the goals)

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**EMPLOYEE'S COMMENTS:**

**\*Employee Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

Employee's signature indicates only that they have received the Performance Appraisal

I have appraised this employee and will conduct a performance discussion.

**Appraiser's Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Next Level Reviewer:** \_\_\_\_\_ **Date:** \_\_\_\_\_

\_\_\_\_\_