



Catholic
Charities
of Los Angeles, Inc.

PERFORMANCE APPRAISAL

For Supervisory and Non-Supervisory Staff

PART I - INSTRUCTIONS

Please follow these instructions carefully to complete the appraisal of your employee's performance during the last performance period.

Give a copy of **PART II, Employee Pre-Interview Worksheet**, to your employee and instruct him/her to complete it in preparation of his/her annual performance review. Briefly explain the form to ensure that the employee understands what is expected and answer any questions. Set a date for the employee to return the completed worksheet to you for your review before the performance appraisal meeting, **and then schedule the meeting.**

Complete **PART III, Performance, Behavioral Traits and Supervisory Factors.**

This section contains five performance factors, seven behavioral traits, and six supervisory factors that are important in the performance of the employee's job. All employees are to be rated on Performance Factors and Behavioral Traits; the Supervisory Factors apply only to employees with supervisory responsibilities. The supervisor/rater should indicate the employee's performance by checking the box next to the appropriate level of performance. **NOTE: A rating of Unacceptable (1) or Needs Improvement (2) on any item requires explanatory comments.**

- 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.

All comments should be included in **Part IV, "Overall Performance Evaluation Narrative."** 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.

Part V, "Overall Performance Score" should then be completed by following the instructions in that section.

Part VI, "For the Employee" is an opportunity for the employee to make any comments regarding the appraisal or the appraisal process.

DISTRIBUTION INSTRUCTIONS	<ol style="list-style-type: none"> 1. Return the original form to CCLA Human Resources 1531 James M. Wood Blvd., Los Angeles, CA 90015 2. Maintain one copy for your departmental records. 3. Provide one copy to the employee
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The following rating scale guide is being provided to assist the supervisor/rater in assigning the most appropriate measurement of the employee's performance factors, behavioral traits and supervisory factors.

NOTE TO THE RATER: After completing the form, and before forwarding it to the next level, please be sure to attach the "Performance Appraisal Cover Sheet" sheet provided to you from Human Resources which contains the name and other pertinent information for each of your employees.

**PART II
PERFORMANCE EVALUATION
EMPLOYEE PRE-INTERVIEW WORKSHEET
To be completed by employee**

EMPLOYEE NAME: _____ REVIEW DATE: _____

JOB CONTENT:

1. Do you have a clear understanding of you current job responsibilities?
a. Yes No
2. In what ways, if any, should your position be structured differently?
3. What do you like about your job?
4. What elements of your job do you think you do best (e.g., ability to handle people, ability to type, ability to problem solve, etc.)?

JOB ACHIEVEMENTS AND PROBLEMS:

1. What were your major performance achievements since your last review?
2. Give one or more examples of things you would like to improve or change. Describe what you can do to achieve the improvement.
3. Do you have any suggestions on how you could enhance the effectiveness of your present position?

PART III PERFORMANCE, BEHAVIORAL TRAITS and SUPERVISORY FACTORS

PERFORMANCE FACTORS

1. **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

2. **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

3. **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

4. **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

5. **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

PART III (Cont'd) SUPERVISORY FACTORS

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

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

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

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

5. **Personnel Management** – Consider how well the employee serves as a role model; provides guidance and opportunities to his/her 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

6. **Budget Responsibility** – If employee has budget responsibility, has he/she remained within budget for the year or does he/she have an acceptable reason for the variance?

Unacceptable Acceptable N/A

**PART IV
OVERALL PERFORMANCE EVALUATION – NARRATIVE**

Read instructions before completion

EMPLOYEE NAME _____ REVIEW DATE _____

DEPT. _____ JOB CODE _____ JOB TITLE _____

1. Responsibilities (review job description and major job duties as well as any special assignments):

2. Performance (describe accomplishments and specific performance results based on job responsibilities as described in 1 above):

PART IV Continued
PERFORMANCE EVALUATION – NARRATIVE

3. Areas for Development and/or Improvement (Provide constructive criticism for areas of performance that require development and/or improvement):

4. Improvement Plan Including Training, Skill Building, Goals, and New Responsibilities (include training received in past year and also specific recommendations for additional training or skill building to assist employee in improving performance and meeting goals and objectives):

PART V - OVERALL PERFORMANCE SCORE

Please use this space to provide the overall performance rating. The overall rating should be a reflection of the performance factors, behavioral traits and supervisory factors. Total the individual scores for the items above, and divide by **15** (the total number of scored factors and traits appraised for supervisory employees) or **10** (the total number of score factors and traits appraised) or all non-supervisory employees, in order to arrive at a final performance number.

Example: *If a supervisory employee's total of all the scores is 49, divide by 15 which would = 3.27 (rounded to two decimal places.)*

Overall Performance Score: _____

NAMES & SIGNATURES

Supervisor/Rater: _____ (PRINT NAME)

_____ (SIGNATURE)

Date: _____

Next Level
Supervisor/Manager: _____ (PRINT NAME)

_____ (SIGNATURE)

Date: _____

PART VI - For 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 (if any) are as follows (attach additional sheets if necessary):

Signature: _____ Date: _____