



**Office Of
Ministerial Evaluation**
Department of Personnel Services

**RESOURCES
FOR
PERFORMANCE MANAGEMENT
WITH
PARISH PERSONNEL**

2009 EDITION

Resources for Performance Management With Parish Personnel

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INTRODUCTION

“There are different kinds of spiritual gifts, but the same Spirit; there are different forms of service but the same Lord; there are different workings but the same God who produces all of them in everyone. To each individual the manifestation of the Spirit is given for some benefit.” (1 Cor. 12, 4-7)

Performance management within an ecclesial context is an invitation to explore how our gifts are being offered in service of the Lord. The purposes of such a process are:

focus: re-centering ourselves in mission; integrating personal, professional and parish goals

learning: identifying strengths and areas for growth which will increase our effectiveness

accountability: assessing how well we have fulfilled our agreed upon responsibilities

The following resources are designed to help parish personnel focus, learn and be accountable. The book includes background materials related to the processes involved in performance management as well as tools which are meant to assist staff members in an analysis of their performance in light of their goals and responsibilities. Some of the resources are also available in Spanish (Sp).

These performance management resources reflect the philosophy that performance management is distinct from the salary increase process. Performance management is geared to continuing effectiveness and ongoing development for one’s ministry or work. It is only one of the factors to be considered in determining salary adjustments. (See *Archdiocesan Compensation Guidelines* for further discussion of salary adjustments.)

It is our hope that these resources are helpful to parish personnel. Your feedback and ideas regarding the resources are most welcome. If you have feedback to offer, please call the Office of Ministerial Evaluation (312) 534-5265 with your ideas, or e-mail them to ome@archchicago.org.

Most of the forms are available through the Archdiocesan website www.archchicago.org or by e-mail.

SECTION I

THE PERFORMANCE MANAGEMENT PROCESS

FOUNDATIONS FOR PERFORMANCE MANAGEMENT¹

Performance Management supports Parish and Archdiocesan overall goals by linking the work of individual staff members to overall mission of the parish or Archdiocese.

Performance Management involves:

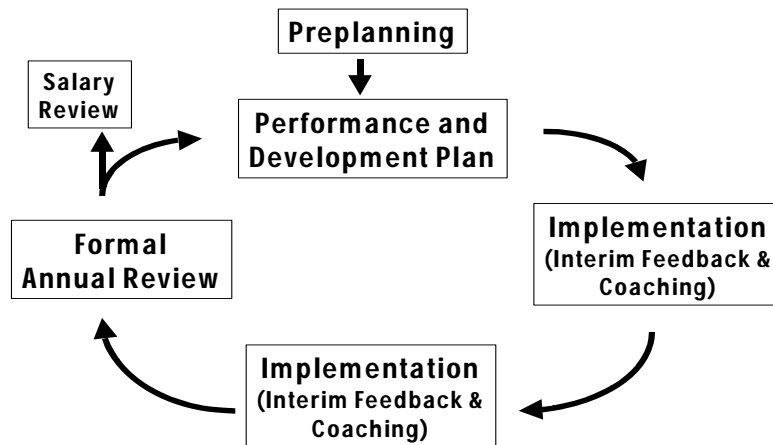
- Having a clear understanding and statement of the mission and goals for the parish and Archdiocese.
- Analyzing the objectives and goals for each area of ministry or position and ensuring that they relate to the overall goals of the parish and Archdiocese.
- Analyzing each staff member's skills and assignments as they relate to parish or Archdiocesan goals.
- Clearly communicating performance goals and expectations to each staff member (team) and gaining agreement on those goals and expectations.
- Recognizing and acknowledging the good performance of staff members.
- Recognizing where performance needs to be improved
- Providing staff members with the necessary support to improve.

In this context, it is helpful to reflect on and discuss the following questions:

- What is the overall mission or vision of the parish/Archdiocese?
- What are the long-term goals and objectives?
- What are the short term or annual goals and objectives of the parish/Archdiocese?
- What are the goals and objectives of each ministry or position?
- What are the individual work goals and objectives for each staff member?

The Performance Management process builds on these understandings.

Performance Management Cycle



¹ Based on *Effective Performance Management* by Sheila J. Costello, McGraw Hill, © 1996

PLANNING FOR PERFORMANCE

An effective performance management process calls for the establishment of goals or objectives that we hope to accomplish in the coming year, as well as standards by which we can measure the achievement of the goal or objective. A **goal or objective** is simply a statement of results to be achieved. Establishing goals and objectives for performance and professional development is a way of enhancing our contribution to ministry and to the parish or place of work. It is also a way of opening ourselves to new opportunities.

Goals and objectives maximize effectiveness and move us into the future. They confirm our mutual understanding of expectations and identify our contributions to the parish or place of ministry.

Performance goals or objectives are statements of the specific, measurable results that one hopes to achieve through ministry or work during the year ahead. These goals are related to the responsibilities of one's position description and are congruent with the vision/mission and goals of the parish or place of ministry. Someone who has responsibility for assisting couples in preparation for the sacrament of marriage might set a goal to revise the existing marriage preparation program. A parish secretary might set a goal to computerize the filing system for parish records. A maintenance person might designate several major repairs as goals to be accomplished. An effective goal or objective includes the standard by which accomplishment can be measured or determined as well as a time-line for completion.

Professional development goals are clear, concrete statements of what one hopes to learn or of skills to be developed in the coming year in order to minister or work more effectively. In a parish or ministry setting where a number of people speak Spanish, a helpful development goal might be to learn Spanish. Where computers or new software are being purchased, learning how to operate the computer or use the software would be an appropriate development goal. Taking a course or workshop in Scripture, accounting, Canon Law or management would also be examples of development goals. Some annual development goals might be steps in the accomplishment of a longer-term goal such as achieving proficiency in Spanish or completing a certificate or degree program.

The following suggestions may be helpful in establishing performance and development goals or objectives.

In preparing to set goals or objectives, consider √the mission and goals and needs of the parish or place of ministry; √the responsibilities outlined in the position description; √the insights gained through self-assessment and discussion with the reviewer(s).

Identify the key results that are to be achieved through the ministry or work. These should relate to critical responsibilities of the position. Also identify skills or areas of learning which would increase the ability to minister or work effectively.

Create goals or objectives that express these results in specific, measurable terms. Make the goals "S.M.A.R.T."

Specific

The goal is written in clear, concise, understandable language. Someone who is not familiar with the job can easily understand it.

Measurable

The goal or objective establishes quantitative criteria wherever possible. It indicates how much one will do: develop one program; input 50% of the records; prepare 20 couples for marriage; learn the fundamentals of Microsoft WORD. There may be times when it is hard to quantify. In these situations it may be preferable to describe what will be observed: a more welcoming atmosphere; clean washroom facilities (to the supervisor's satisfaction, or based on a complaint rate); increased participation by the congregation who attends Sunday liturgy.

Achievable/Agreed

The goal or objective is achievable in relation to one's available time, resources, knowledge, experience, ability etc. On the other hand, it should be as challenging as possible. In addition, agreement on goals or objectives greatly strengthens ownership and responsibility, and increases the likelihood that they will be accomplished.

Results-oriented

The goal indicates what is to be achieved. It starts with a verb like "develop," "implement," "design," "increase" etc. and is geared to accomplishing something that contributes to the overall parish or workplace goals and plans. It specifies "what" and "when," not "why" and "how."

Time-framed

The goal should identify a target date.

Examples of performance goals might be:

- To incorporate suggestions from married couples into the marriage preparation program by January of this year
- To attend 90% of the Parish Pastoral Council meetings this year
- To develop a working liturgy committee by the end of this year
- To repair and paint all windows in the rectory by December
- To spend the first half hour of the day in personal prayer
- To hire a competent business manager by April
- To set up and begin using a database for keeping the sacramental records of the parish
- To vacuum and dust the parish offices twice a week
- To complete an audit of the parish finances by October
- To establish position descriptions for each of the parish employees by September
- To transfer the coordination of the catechumenate formation to the new catechumenate director by June

The implementation of each of these goals might take several steps. If you wish, these can be articulated in a more detailed action plan that outlines steps toward achieving the goal and breaks down the goal into manageable segments.

The performance plan form in Section II may be used to record performance and development goals or objectives for the coming year.

REVIEWING PERFORMANCE

1. Purpose of Performance Review Meeting

Successful fulfillment of the mission of the local Church depends on the quality and dedication of personnel who are committed to excellence and continuous improvement of their own performance. One tool that is helpful in creating an environment that supports effective performance is a system of performance management. Effective performance review and planning meetings are important steps in which both the supervisor and minister/employee are able to establish clear performance expectations and monitor performance against those jointly agreed upon standards. Performance review discussion reinforces positive performance while addressing areas that need improvement.

2. Planning for the Meeting

The following steps are part of the preparation process:

Mutually schedule a specific time and place for the meeting. Allow adequate time. Prevent interruptions. Find a private meeting space.

| Supervisor | Minister/Employee |
|--|--|
| <ul style="list-style-type: none"> • Prepare your assessment based on your observations regarding the minister's/employee's accomplishments and skills in light of the parish mission and goals, role description and specific objectives. • Review the minister's/employee's self-assessment and feedback from those served and prepare your feedback, incorporating specific examples of behavior into the feedback. • If ratings will be used, determine <u>proposed</u> ratings and note rationale for your selection. • Review performance objectives and prepare supplemental objectives if necessary. <p>NOTE: In preparing for performance review, it is important to avoid tendencies that stem from personal bias. These are noted later in the section entitled, "Rating Errors".</p> | <ul style="list-style-type: none"> • Do a self-assessment, preparing background information about accomplishments and self-assessment of skills in light of the parish mission and goals, role description and specific objectives. • Use specific examples and incorporate feedback from those who are served by the ministry/work. • Draft possible performance objectives for the coming year. • Submit self-assessment and proposed objectives to supervisor prior to the meeting. • Shortly before the meeting summarize the accomplishments and challenges of the year. |

3. Conducting the Review and Planning Meeting

The following steps are an important part of conducting a performance review and planning meeting:

a. Start the meeting.

| Supervisor | Minister/Employee |
|--|--|
| <ul style="list-style-type: none"> • Plan your opening remarks in order to put yourself and the minister/employee at ease. • Review the purpose of the meeting. • Approach the discussion as a two-way conversation. • Take the meeting seriously. | <ul style="list-style-type: none"> • Indicate your objectives for the meeting. • Approach the meeting as a two-way conversation • Take the meeting seriously. |

b. Proceed with minister/employee self-assessment.

| Supervisor | Minister/Employee |
|---|---|
| <ul style="list-style-type: none"> • Listen carefully. • Ask questions for clarification. • Ask open-ended questions to encourage dialogue. • Summarize what the minister/employee said. • Refrain from judging or contradicting the minister/employee during the self-assessment. | <ul style="list-style-type: none"> • Present your self-assessment. • Clarify as necessary, using specific examples to illustrate your statements. |

c. Incorporate supervisor assessment.

| Supervisor | Minister/Employee |
|---|---|
| <ul style="list-style-type: none"> ▪ Begin your assessment in the context of the minister/employee’s self-assessment. ▪ Focus on the areas of agreement first. ▪ Discuss areas where your assessment differs. Explain your rationale. ▪ Offer feedback, not criticism.² ▪ Use non-evaluative approaches.³ ▪ Do not try to reach consensus regarding differences, but focus rather on understanding the review. ▪ Focus on performance, not the person. ▪ Be open and honest; accept openness and honesty. | <ul style="list-style-type: none"> ▪ Listen carefully. ▪ Ask questions for clarification. ▪ Ask for specific examples of behavior when seeking clarification of feedback. ▪ Summarize what the supervisor has said. ▪ Focus on understanding the review so that you can work toward improved performance. ▪ Be open and honest. |

d. Plan for the following year. Both supervisor and minister/employee

- Discuss the gaps between expectations and accomplishments.
- Analyze. Employ problem-solving techniques.
- Address constraints on achievement of goals, responsibilities.
- Mutually set specific objectives and goals.
- Modify position description if necessary.
- Plan follow-up meetings as necessary.

e. Close the meeting.

- Summarize the conclusions and next steps.
- It is quite possible that performance review, analysis and planning for the future might not be completed in a single meeting. It is also helpful to have some time between the review and analysis of performance and the tentative formulation of new goals or objectives, and the finalization of a plan.

f. Both the minister/employee and the supervisor provide on-going feedback to each other regarding performance throughout the year.

² Feedback describes behavior and provides information so that the minister/employee can make a judgment based on the information. Criticism is judgmental, creates defensiveness and is negative in tone.

³ See examples on following pages, “Non-Evaluative Approaches to Performance Discussion.”

RATING ERRORS⁴

| ERROR | DEFINITION | EXAMPLE |
|-----------------------------------|---|---|
| Attractiveness effect | The well-documented tendency for people to assume that people who are physically attractive are also superior performers. | Samuella rated sales representatives who were tall, trim and attractive higher than those who were only average in their appearance, even though there was no significant difference in the quality of their work. |
| First Impression error | The tendency to make an initial positive or negative judgement of another person and allow that first impression to color or distort later information. | When Rachael took over her department, she noticed one staff member who was going through a divorce, performing poorly. Within a month that staff member's performance had improved to its previously high level, but Rachael's opinion of the individual's performance remained negative. She did not recognize the improvement. |
| Halo/horns effect | Inappropriate generalizations from one aspect of an individual's performance to all areas of that person's performance. | Jeff was excellent in his presentation skills. He received rave reviews whenever he gave talks or workshops. His supervisor rated him as FAR EXCEEDS EXPECTATIONS in all areas, even though he did not communicate effectively with colleagues on the staff, and was consistently late with the projects he was working on. |
| Similar-to-me effect | Tendency of individuals to rate people who resemble themselves more highly than they rate others. | As a manager, Brett, was logical, detail-oriented, and prompt to respond to deadlines. He unwittingly rated several staff members who also had these qualities higher overall than others whose strengths included creativity, visioning, and initiating new endeavors, but who were not always on time with their work. |
| Central tendency | Inclination to rate people in the middle of the scale even when their performance clearly warrants a substantially higher or lower rating. | Because he does not like to compare staff with one another, and is not comfortable with confrontation, Harold rated all of his staff members as MEETS EXPECTATIONS, despite significant differences in their performance. |
| Negative and positive skew | The opposite of central tendency. The rating of all individuals as higher or lower than their performance actually warrants. | Susan believes that everyone needs some improvement, so she does not give any ratings higher than MEETS EXPECTATIONS for even the highest performers. Al believes that he has hired only exceptional staff members, so he gives only ratings of EXCEEDS OR FAR EXCEEDS EXPECTATIONS. |
| Attribution bias | Tendency to attribute performance failings to factors under the control of the individual and performance successes to external causes. | When a member on Harriet's staff falls behind in his or her work, Harriet attributes it to poor organizational skills on the part of the staff member, even though there may have been an extraordinarily high workload, or an unexpected emergency that took additional time. On the other hand, when a staff member stays on top of things, she feels that it is because of her exceptional leadership skills. |
| Recency effect | Tendency for minor events that have happened more recently to have more influence on ratings than major events of many months ago. | Concepción kept no records or notes regarding the quality of her staff's work. When it came time for reviews, she relied on examples from only the previous two months. She had completely forgotten major accomplishments and consistently effective performance from earlier in the review period. |
| Stereotyping | Tendency to generalize across groups and ignore individual differences. | Juan is a quiet, reserved person. Yet when he is on the phone with a pastor or parish minister trying to resolve a problem, he is very effective in listening and helping to resolve the issue. When he does offer his opinion in a staff meeting, it is usually quite insightful. However, because of his reserve, his supervisor rates his performance lower than that of other consultants who are more vocal. |

⁴ Based on *Making Performance Management Work*, a workshop by Dick Grote, October 30, 2000. © 2000 Grote Consulting Corporation, 15303 Dallas Parkway, Suite 645, Addison, Texas 75001-6725. Used with permission.

NON-EVALUATIVE APPROACHES TO PERFORMANCE DISCUSSION⁵

For a performance review or planning meeting to be effective in affirming and strengthening performance, it is important that a climate of openness be maintained. This is not usually difficult when affirming good performance. However, when one must confront poor or marginal performance, it is sometimes more difficult to prevent a spirit of self-defensiveness from pervading the discussion. While it might be impossible to completely eliminate defensiveness, the following non-evaluative approaches might prove helpful in addressing sensitive issues.

| EVALUATIVE | NON-EVALUATIVE |
|------------|----------------|
|------------|----------------|

| Evaluative | Descriptive |
|---|--|
| <ul style="list-style-type: none"> You simply can't keep making these stupid mistakes. Oscar, you're tactless and undiplomatic. You're too belligerent when dealing with co-workers. The budget deficit is your fault. You ignored the accounting procedures. | <ul style="list-style-type: none"> We're still having a problem reducing the number of errors in our parent newsletter. Some people interpret your candor as hostility. Many of the staff members perceive your attitude to be belligerent. This budget deficit appears to involve some differences in interpreting our accounting procedures. |

| Control | Problem Orientation |
|--|---|
| <ul style="list-style-type: none"> Mary, I'd like to see you working on files next week. I think the only answer is to move your office over to the school. I think my suggestions are clear, so why don't you get back to work. Here's what you must do to reduce mistakes. | <ul style="list-style-type: none"> Mary, in light of next week's schedule what do you see as your priorities? One possibility is to move your office over to the school. Would that help? Let's think about these suggestions and get back together next week after you've considered them. What do you think we might do to reduce mistakes? |

| Neutrality | Empathy |
|--|--|
| <ul style="list-style-type: none"> I really don't know what we can do about it. I didn't know that. You could have something there, but let's get back to the real problem. | <ul style="list-style-type: none"> At this point, I can't think of anything, but I know where we might look for help. I wasn't aware of that. Let me make sure I understand. I'm not certain I understand how that relates to this problem. Why don't you fill me in before we go on? |

⁵ Based on "Non-evaluative Approaches to Performance Appraisals" by Les Wallace, from *The Performance Appraisal Sourcebook*, published by Human Resource Development Press. Originally published in *Supervisory Management*, March 1978; © 1978 by Amacom, a division of the American Management Association.

NON-EVALUATIVE APPROACHES TO PERFORMANCE DISCUSSION

| Superiority | Equality |
|--|---|
| <ul style="list-style-type: none"> • Sally, I've been handling this problem for 10 years. I ought to know what will work. • I don't think I need to give you all the background. Why don't we just handle it this way for now? • The staff thought this policy through pretty thoroughly. • You secretaries really don't need to know the rationale. • I'm being paid to make these decisions, not you. | <ul style="list-style-type: none"> • This idea has worked before. Do you think it might work in this case? • You might find some of the background information helpful, so let me fill you in a bit. • We have discussed this policy at the staff meeting and I'm interested in your reactions and thoughts. • Let me go over the rationale with you. You might find it helpful. • I'll have to make the final decision, but why don't you get your suggestions in to me right away. |

| Certainty | Professionalism |
|---|--|
| <ul style="list-style-type: none"> • I know what the problem is. I don't think I need another opinion. • This is the way we're going to do it. • I've thought these suggestions through thoroughly, so let's not waste time arguing. | <ul style="list-style-type: none"> • I have a view of the problem, but I'd be interested in what you think. • Let's try this for a couple of weeks; then we can reconsider based on that experience. • I've tried to think these suggestions through pretty thoroughly. Can you see anything I may have left out? |

A move toward non-evaluative approaches should result in:

- Analysis instead of appraisal
- Improved creativity in solving problems, due to greater employee input
- Less supervisory reluctance to discuss performance problems
- A clearer understanding by the employee of why and how he/she needs to change work behavior
- The growth of a climate of cooperation, which increases individual and group motivation to achieve performance goals
- Greater employee self-reliance, which improves the individual's ability to diagnose problems and react quickly with less supervisory assistance

PERFORMANCE MANAGEMENT

COMMONLY ASKED QUESTIONS—AND SOME RESPONSES

How do I review people who report to me but whom I do not often observe “in action”?

- Establish goals and benchmarks of performance.
- Have them do self-assessment in light of goals and benchmarks.
- Encourage honesty through a non-judgmental atmosphere—an atmosphere where mistakes are seen as opportunities for learning and growth.
- Ask them for names of persons who can give feedback regarding their work, and ask for permission to consult with them. Incorporate feedback from those being served by the person—staff served by support staff, catechists/parents served by DRE, ministers and others served by Pastoral Associate.
- Schedule regular meetings to stay up-to-date with one another.

How do I communicate feedback that I have received from others about someone whom I supervise, but have not directly observed?

- First, ask the person offering the feedback to you if they would share it directly with the person.
- Ask the person offering the feedback to you if it's OK if you share it with the person.
- Distinguish between one incident and many reported incidents that add up to a pattern of behavior.

How do I share negative feedback in a constructive way?

- Set the context. Note positive aspects as well as negative.
- Use “I” messages.
- Be honest. Use non-judgmental language. Describe behaviors and effects of behaviors.
- Back up the feedback with data.
- Solicit the recipient's perspective on the issue and in developing a plan.

Who should review whom?

- This depends on reporting structure.

- Ordinarily ministerial personnel report to the pastor. Support staff sometimes report to ministerial personnel, sometimes to the business manager.
- Sometimes collaborative reviews may be necessary if someone does work for several persons.
- Teams might want to regularly review how they relate to one another, how they make decisions, how effective they are.

How does one facilitate the evaluation discussion so that it stays focused and on track?

- State purposes and goals of discussion.
- Acknowledge the digression and offer to talk about it at another time or at the end of the meeting if time permits.
- Make a list of important side issues if necessary.
- Use assertion to re-track the conversation.
- Use focus questions based on the review, the plan, and the work environment. *What New and Seasoned Managers Would Like to Know from Their Staff, Colleagues, Co-Workers*, available from the Office of Conciliation, has several helpful questions.

How does the supervisor respond when an employee defends a critiqued behavior by comparing it with that of other employees?

- “That is an interesting insight, observation, and I will consider your information, but the purpose of this discussion is to talk about how this impacts your work/ our working relationship.”
- “It's no more appropriate for me to discuss another employee with you than it would be to talk about you with him/her.”
- The issue may have been addressed, but it is not appropriate to tell the employee this.

Is it ever appropriate to have a third party present during a performance review meeting?

- Not usually—ordinarily this might happen in a disciplinary or termination meeting, or

- briefly, if an employee refuses to sign the review.

What kind of documentation is appropriate, helpful and/or necessary to support the assessment offered in a performance review?

- Examples of good or poor work, dates and times of occurrences—all of which have been previously mentioned to the employee at the time of occurrence
- Specific, non-judgmental
- Avoid using always, never

What if we can't finish reviewing and planning in one meeting?

- This is highly likely. It is often good to have time for ideas to simmer between review and tentative planning, and the finalizing of a plan.
- Schedule a follow up meeting and stick to it.
- Perhaps the staff member can draft the performance plan, based on the discussion, in preparation for that meeting.

What is the role of goals or expectations that are set as part of the performance management process?

- Set specific direction for the staff member for the coming year.
- Provide targets for what is to be accomplished.
- State clearly what results are expected. Clarify expectations.
- Provide a concrete framework for assessing performance.
- Provide focus.
- Create a road map before the journey is begun.

How does a supervisor handle the situation when an employee does not agree with his/her evaluation?

- Begin by determining what both can agree on.
- Clarify where the differences lie.
- Respect their right to disagree. Listen to their perspective.
- Modify your perspective if appropriate. If not, reaffirm your expectations.
- Help employee to understand your mindset—the importance you place on the behavior, your rationale.

- Encourage the person to write his/her differences in opinion and include support information.

- Set another time to talk if necessary.

If common ground is not reached, encourage the person to submit a statement for the record.

When the discussion reaches the point where the supervisor has to say “That’s the way it is,” how should this situation be handled?

- Acknowledge that you have heard and understand the other person’s point. Validate their reasons and their feelings.
- Say that you are willing to consider or reconsider in time (if this is appropriate), but for now, this is what you expect, want, need. If you set a trial period, schedule a time to check back with one another.
- Note that the employee has the right to disagree, to put his/her perspective in writing for the personnel file.

What if the employee refuses to sign the evaluation form?

- See above ideas.
- In addition, if there has been adequate discussion, and depending on the circumstances, the supervisor can invite a third party to serve as witness that the review has been presented and discussed and that the employee has refused to sign.
- Also, it is a good idea to add a disclaimer to the evaluation form indicating that the employee’s signature verifies that the review was presented and discussed, but does not necessarily indicate agreement with the assessment of the supervisor.

What can an employee put into his/her file? Whose file is it?

- It is the employer’s file.
- By law, the employee has the right to inspect the contents of the personnel file, except for information exempted by law, such as medical records and confidential employment references.

In what circumstances might the pastor, or the next level manager get involved in an

evaluation which has been delegated to the business manager or some other appropriate staff member?

- Upon request, after the supervisor and staff member have really tried to work through things.
- The pastor/manager needs to be clear on his/her role in the process: listener, facilitator, arbitrator, or neutral 3rd party. He/she also needs to be aware when role changes (if it does).
- If one party approaches the pastor/manager with a complaint about another, he/she should assure that the person has talked with the other person.
- His/her involvement will also be contingent on how well he/she really knows the person's work.

What is the frequency and content of the regular feedback to be provided to employees in an on-going basis throughout the year?

- Remember performance management is a process, not an event.

- Ask what employee finds helpful. Ask yourself what you need, also. Then blend your needs and the employee's into a coherent plan. Revise if circumstances warrant.
- Offer feedback when it happens; offer positive as well as constructive feedback
- Remember that feedback is a two-way street—employee needs to offer feedback to supervisor as well.
- Minimally there should be 2 or 3 established checkpoints annually.

What if discipline is needed?

- Ordinarily, discipline is not part of the performance review process.
- Schedule a separate meeting.
- Create a plan for improvement.
- Allow enough time for the employee to improve the objectionable behavior or meet the performance standards.
- It is helpful to have a memo outline prepared ahead of time. This serves as a guide to the discussion. It can also be given to the staff member for later reference.

SECTION II

TOOLS & FORMS FOR PERFORMANCE MANAGEMENT

PERFORMANCE PLAN

Plan Year _____

Staff Member Name _____ Position/Title _____

Background on preparing specific, measurable, concrete goals and objectives can be found in Section II. ("Planning for Performance")

A. PROFESSIONAL DEVELOPMENT GOAL (S)

- *In the section below, state a professional development goal (or goals) that you expect to achieve during the coming year. A development goal indicates something you plan to learn, or a skill you hope to improve, that will help you fulfill the responsibilities of your position or the mission of the parish more effectively. (Rating and assessments will be completed at the next annual review.)*

| Professional Development Goal (s) | Rating(s): |
|-----------------------------------|------------|
| | |

Self-Assessment (to be completed at next annual review)

Supervisor Assessment (to be completed at next annual review)

B. PERFORMANCE OBJECTIVES

- *In the following sections write 3-8 **specific, concrete, measurable** performance objectives that you plan to accomplish within the coming year. These should be related to key responsibilities from your role description. Objectives may indicate a current level of performance that you wish to maintain, give direction for improvement, or describe targets that you plan to accomplish. Please remember to adjust this plan if responsibilities change significantly during the year. See section on Performance Planning for additional help. (Duplicate the following page as necessary.)*

| |
|---|
| Performance Objective |
| Rating: (Complete at next annual review) |

Self-Assessment (to be completed at next annual review)

Supervisor Assessment (to be completed at next annual review)

Performance Objective

Rating: (Complete at next annual review)

Self-Assessment (to be completed at next annual review)

Supervisor Assessment (to be completed at next annual review)

Performance Objective

Rating: (Complete at next annual review)

Self-Assessment (to be completed at next annual review)

Supervisor Assessment (to be completed at next annual review)

Performance Objective

Rating: (Complete at next annual review)

Self-Assessment (to be completed at next annual review)

Supervisor Assessment (to be completed at next annual review)

- ✓ Please keep a copy of these pages. You will use them to assess the completion of the professional development goal(s) and objectives in next year's review.

MINISTRY REVIEW FEEDBACK (Sp)⁶

Following are sample questions that may be used by ministry leaders in soliciting feedback from volunteers who assist in the ministry.⁷ Additional methods of obtaining feedback include a comprehensive evaluation of the ministry. Feedback may be solicited through surveys or focus groups of participants in programs/services such as the youth group, Bible study group, marriage preparation, religious education program etc.

Sample introduction

As part of my annual review of ministry, I am seeking feedback from persons served through the ministry. By reflecting on this feedback I will have a greater sense of my strengths and of areas for growth in ministry. Thank you for your willingness to give time and prayerful consideration to the following questions. Please return this form to _____ (Insert name of person to whom form is to be returned) _____ by _____ (Date) _____.

Signature of minister

Sample questions

- Describe how this ministry leader (staff member) has helped you in the performance of your ministry this year. In what ways have you been affirmed? In what ways have you been frustrated?
- How has this ministry leader encouraged you to explore your talents and to work creatively within your chosen area of ministry?
- In what ways do you perceive that prayer is an important aspect of this person's ministry? How has he/she modeled styles of prayer for you and encouraged growth in your own prayer life?
- How has in-service that was offered by this ministry leader assisted you in your work in this ministry?
 - a. What formation/education/growth opportunities were offered?
 - b. What activities did you take advantage of?
 - c. How did these opportunities meet your needs? the needs of those served by your ministry?
- How has communication from this ministry leader helped to keep you informed? In what ways might the communication been more effective?
- How does the person demonstrate professionalism and approachability in his/her ministerial leadership?
- Do you find this ministry enjoyable and fulfilling? why or why not?
- What do you perceive to be the most important accomplishments of this ministry leader during the past year?

⁶ Sp = Available in Spanish (Section III)

⁷ Based on questions developed by staffs of St. Edna and St. Francis Xavier (LaGrange) parishes.

ARCHDIOCESE OF CHICAGO

**PASTORAL ASSOCIATE
PERFORMANCE REVIEW**

(This form may be used both for self-assessment and supervisor-assessment.)

PASTORAL ASSOCIATE: _____

PARISH NAME: _____

FORM COMPLETED BY: _____

DATE: _____

PERFORMANCE RATINGS: (Select all appropriate ratings)

- 4. CONSISTENTLY EXCELLENT PERFORMANCE - EXPLANATION REQUIRED
- 3. ABOVE AVERAGE PERFORMANCE ON A CONSISTENT BASIS
- 2. PERFORMANCE MEETS THE BASIC JOB REQUIREMENTS
- 1. PERFORMANCE FAILS TO MEET JOB REQUIREMENTS - EXPLANATION REQUIRED

(Note: If a category does not apply to the position under review, please leave it blank.)

PART ONE: PERFORMANCE AGAINST PREVIOUS YEAR'S OBJECTIVES

OBJECTIVE

COMMENTS

| OBJECTIVE | 4 | 3 | 2 | 1 | COMMENTS |
|-----------|---|---|---|---|----------|
| 1. | | | | | |
| 2. | | | | | |
| 3. | | | | | |

PART TWO: THREE OBJECTIVES FOR THE COMING YEAR

**PART THREE: LIST KEY JOB RESPONSIBILITIES AND EVALUATE PERFORMANCE
(Prioritize primary responsibilities from Job Analysis Worksheets)**

KEY JOB RESPONSIBILITIES

COMMENTS

| | | | | | |
|----|---|---|---|---|--|
| 4. | 4 | 3 | 2 | 1 | |
| 5. | 4 | 3 | 2 | 1 | |
| 6. | 4 | 3 | 2 | 1 | |
| 7. | 4 | 3 | 2 | 1 | |
| 8. | 4 | 3 | 2 | 1 | |
| 9. | 4 | 3 | 2 | 1 | |

COMMUNICATION SKILLS

COMMENTS

| | | | | | |
|--|---|---|---|---|--|
| 10. Verbal Skills | 4 | 3 | 2 | 1 | |
| 11. Written Skills | 4 | 3 | 2 | 1 | |
| 12. Ability to communicate with peers | 4 | 3 | 2 | 1 | |
| 13. Ability to communicate with supervisor | 4 | 3 | 2 | 1 | |

PROBLEM SOLVING SKILLS

COMMENTS

| | | | | | |
|--|---|---|---|---|--|
| 14. Works in collaboration to solve problems | 4 | 3 | 2 | 1 | |
| 15. Uses sound judgement | 4 | 3 | 2 | 1 | |
| 16. Makes constructive recommendations | 4 | 3 | 2 | 1 | |

SPECIFIC MINISTRY: PASTORAL ASSOCIATE

KNOWLEDGE OF JOB

COMMENTS

| | | | | | |
|---|---|---|---|---|--|
| 17. Exhibits needed skills | 4 | 3 | 2 | 1 | |
| 18. Performs duties within the required standards | 4 | 3 | 2 | 1 | |
| 19. Continues education to update skills | 4 | 3 | 2 | 1 | |
| 20. Exhibits skills in leadership of others | 4 | 3 | 2 | 1 | |
| 21. Willingly learns new skills | 4 | 3 | 2 | 1 | |

GROUP WORK

COMMENTS

| | | | | | |
|---|---|---|---|---|--|
| 22. Facilitates effective group meetings | 4 | 3 | 2 | 1 | |
| 23. Delegates authority effectively | 4 | 3 | 2 | 1 | |
| 24. Works with other ministerial groups collaboratively | 4 | 3 | 2 | 1 | |
| 25. Contributes to a sense of community | 4 | 3 | 2 | 1 | |

RESPONSIBILITY

COMMENTS

| | | | | | |
|---|---|---|---|---|--|
| 26. Volunteers to handle non-routine tasks | 4 | 3 | 2 | 1 | |
| 27. Mediation skills | 4 | 3 | 2 | 1 | |
| 28. Locates and evaluates new resources | 4 | 3 | 2 | 1 | |
| 29. Works effectively within the parish environment | 4 | 3 | 2 | 1 | |
| 30. Interpersonal skills | 4 | 3 | 2 | 1 | |
| 31. Initiates new parish programs | 4 | 3 | 2 | 1 | |

Note work, committees and projects, which were performed on a regional, diocesan, or national level by the pastoral associate:

PART FOUR: GENERAL COMMENTS

OVERALL PERFORMANCE EVALUATION

- A. TOTAL POINTS (FACTORS 1 – 31) _____
- B. NUMBER OF CATEGORIES _____
- C. AVERAGE RATING
(A DIVIDED BY B) _____

SIGNATURE OF REVIEWER: _____ DATE: _____

POSITION: _____

SIGNATURE OF PASTORAL ASSOCIATE: * _____ DATE: _____

**Signature does not necessarily indicate agreement with the supervisor's comments and ratings, only that the information in this document, including next year's performance objectives, was discussed by the pastoral associate and the supervisor.*

SALARY GUIDELINES

Please refer to the Compensation Guidelines for information about how to determine salary increases.

**ARCHDIOCESE OF CHICAGO
DIRECTOR/COORDINATOR OF RELIGIOUS EDUCATION**

PERFORMANCE REVIEW

(This form may be used both for self-assessment and supervisor assessment.)

CATECHETICAL LEADER: _____

PARISH NAME: _____

FORM COMPLETED BY: _____

DATE: _____

PERFORMANCE RATINGS: (Select all appropriate ratings.)

- 4. CONSISTENTLY EXCELLENT PERFORMANCE - EXPLANATION REQUIRED
- 3. ABOVE AVERAGE PERFORMANCE ON A CONSISTENT BASIS
- 2. PERFORMANCE MEETS THE BASIC JOB REQUIREMENTS
- 1. PERFORMANCE FAILS TO MEET THE JOB REQUIREMENTS - EXPLANATION REQUIRED

(Note: If a category does not apply to the position under review, please leave it blank.)

PART ONE: JOB RELATED CRITERIA

COMMENTS

| | | | | | |
|--|---|---|---|---|--|
| 1. Recruits, trains, forms and supervises catechetical staff | 4 | 3 | 2 | 1 | |
|--|---|---|---|---|--|

Plans, administers, assesses and evaluates the following programs. (Specify)

| | | | | | |
|----|---|---|---|---|--|
| 2. | 4 | 3 | 2 | 1 | |
| 3. | 4 | 3 | 2 | 1 | |
| 4. | 4 | 3 | 2 | 1 | |

PART TWO: GENERAL QUALIFICATIONS AND PERFORMANCE CRITERIA

ADMINISTRATION

COMMENTS

| | | | | | |
|---|---|---|---|---|--|
| 5. Manages time effectively | 4 | 3 | 2 | 1 | |
| 6. Demonstrates effective organizational skills | 4 | 3 | 2 | 1 | |
| 7. Initiates new programs when appropriate | 4 | 3 | 2 | 1 | |
| 8. Exhibits effective communication skills | 4 | 3 | 2 | 1 | |
| 9. Demonstrates good leadership skills | 4 | 3 | 2 | 1 | |
| 10. Exhibits good evaluation skills | 4 | 3 | 2 | 1 | |
| 11. Coordinates new and existing programs | 4 | 3 | 2 | 1 | |
| 12. Delegates authority effectively | 4 | 3 | 2 | 1 | |
| 13. Actively participates on the parish staff | 4 | 3 | 2 | 1 | |
| 14. Budgets resources effectively | 4 | 3 | 2 | 1 | |

COMMUNITY BUILDING

COMMENTS

| | | | | | |
|--|---|---|---|---|--|
| 15. Mediates effectively | 4 | 3 | 2 | 1 | |
| 16. Listens effectively | 4 | 3 | 2 | 1 | |
| 17. Networks well with other professionals | 4 | 3 | 2 | 1 | |
| 18. Is accessible to parishioners | 4 | 3 | 2 | 1 | |
| 19. Demonstrates good interpersonal skills | 4 | 3 | 2 | 1 | |

COMMUNITY BUILDING (Con't.)

COMMENTS

| | | | | | |
|--|---|---|---|---|--|
| 20. Works well within the parish environment | 4 | 3 | 2 | 1 | |
| 21. Contributes to a sense of community | 4 | 3 | 2 | 1 | |

CATECHESIS

COMMENTS

| | | | | | |
|--|---|---|---|---|--|
| 22. Displays effective training and formation skills | 4 | 3 | 2 | 1 | |
| 23. Enhances personal development | 4 | 3 | 2 | 1 | |
| 24. Facilitates groups effectively | 4 | 3 | 2 | 1 | |
| 25. Locates and evaluates new catechetical resources | 4 | 3 | 2 | 1 | |
| 26. Motivates and teaches others effectively | 4 | 3 | 2 | 1 | |

PART THREE: PERFORMANCE OF PREVIOUS YEAR'S OBJECTIVES

| | | | | | |
|-----|---|---|---|---|--|
| 27. | 4 | 3 | 2 | 1 | |
| 28. | 4 | 3 | 2 | 1 | |
| 29. | 4 | 3 | 2 | 1 | |

PART FOUR: OBJECTIVES FOR THE COMING YEAR

WHAT WORK, COMMITTEES, AND PROJECTS WERE PERFORMED ON A REGIONAL, DIOCESAN, OR NATIONAL LEVEL BY THE DRE/CRE?

PART FIVE: GENERAL COMMENTS

OVERALL EVALUATION RATING (AVERAGE)

TOTAL POINTS (CRITERIA 1-29) _____

NUMBER OF APPLICABLE CRITERIA _____

OVERALL PERFORMANCE RATING
(POINTS DIVIDED BY # OF APPLICABLE CRITERIA) _____

SIGNATURE OF REVIEWER: _____ DATE: _____

POSITION: _____

SIGNATURE OF CATECHETICAL LEADER*: _____ DATE: _____

**Signature does not necessarily indicate agreement with the supervisor's comments and ratings, only that the information in this document, including next year's performance objectives, was discussed by the catechetical leader and the supervisor.*

SALARY GUIDELINES

Please refer to the Compensation Guidelines for information about how to determine salary increases.

**ARCHDIOCESE OF CHICAGO
DIRECTOR OF YOUTH MINISTRY
COORDINATOR OF YOUTH MINISTRY**

PERFORMANCE REVIEW

(This form may be used both for self-assessment and supervisor assessment.)

YOUTH MINISTER: _____

PARISH NAME: _____

FORM COMPLETED BY: _____

DATE: _____

PERFORMANCE RATINGS: (Select all appropriate ratings.)

- 4. CONSISTENTLY EXCELLENT PERFORMANCE - EXPLANATION REQUIRED
- 3. ABOVE AVERAGE PERFORMANCE ON A CONSISTENT BASIS
- 2. PERFORMANCE MEETS THE BASIC JOB REQUIREMENTS
- 1. PERFORMANCE FAILS TO MEET THE JOB REQUIREMENTS - EXPLANATION REQUIRED

(Note: If a category does not apply to the position under review, please leave it blank.)

PART ONE: JOB RELATED CRITERIA

WORD

COMMENTS

| | | | | | |
|---|---|---|---|---|--|
| 1. Works with youth and adults to provide formal and informal faith sharing, catechesis and education | 4 | 3 | 2 | 1 | |
| 2. Plans, directs and supervises youth retreats and the formation of the retreat team | 4 | 3 | 2 | 1 | |
| 3. Supervises a youth drop-in center and/or times for informal gathering of youth and volunteers | 4 | 3 | 2 | 1 | |
| 4. Provides outreach and evangelization to youth in the community | 4 | 3 | 2 | 1 | |
| 5. Present at social, school and recreational events for youth | 4 | 3 | 2 | 1 | |

WORSHIP

| | | | | | |
|---|---|---|---|---|--|
| 6. Plans and implements specific youth liturgical celebrations and events | 4 | 3 | 2 | 1 | |
| 7. Provides opportunities with parish liturgy team for youth participation in parish liturgical celebrations and events | 4 | 3 | 2 | 1 | |
| 8. Encourages and assists in formation of youth as worship leaders | 4 | 3 | 2 | 1 | |

CREATING COMMUNITY

| | | | | | |
|---|---|---|---|---|--|
| 9. Organizes and conducts trips and enrichment opportunities for youth | 4 | 3 | 2 | 1 | |
| 10. Supervises and provides youth sports programs and recreational activities | 4 | 3 | 2 | 1 | |
| 11. Provides formal and informal opportunities for teens to build community | 4 | 3 | 2 | 1 | |
| 12. Manages fundraising programs to instill ownership of youth ministry | 4 | 3 | 2 | 1 | |

GUIDANCE AND HEALING

| | | | | | |
|--|---|---|---|---|--|
| 13. Acts as a resource for youth and families | 4 | 3 | 2 | 1 | |
| 14. Provides counseling & referrals for youth, parents & families to appropriate resources & programs (e.g. crisis prevention, drug & alcohol prevention, etc) | 4 | 3 | 2 | 1 | |
| 15. Plans and provides for formal and informal ministry opportunities for youth and their families | 4 | 3 | 2 | 1 | |

JUSTICE AND SERVICE

| | | | | | |
|---|---|---|---|---|--|
| 16. Provides peace and justice education and/or opportunities for youth | 4 | 3 | 2 | 1 | |
| 17. Provides service opportunities for youth | 4 | 3 | 2 | 1 | |

ENABLEMENT

| | | | | | |
|--|---|---|---|---|--|
| 18. Encourages youth participation in deanery, vicariate, archdiocesan and national events | 4 | 3 | 2 | 1 | |
| 19. Plans, administers and evaluates youth leadership development | 4 | 3 | 2 | 1 | |

ADVOCACY

| | | | | | |
|--|---|---|---|---|--|
| 20. Interprets the needs and speaks for youth on the parish and community levels | 4 | 3 | 2 | 1 | |
| 21. Coordinates the production and distribution of a teen newsletter | 4 | 3 | 2 | 1 | |
| 22. Provides outreach to early adolescents | 4 | 3 | 2 | 1 | |
| 23. Networks with other Youth Ministers (Deanery, Vicariate, Regional and National levels) | 4 | 3 | 2 | 1 | |

ADVOCACY, cont.

COMMENTS

| | | | | | |
|--|---|---|---|---|--|
| 24. Maintains communication with local high schools | 4 | 3 | 2 | 1 | |
| 25. Networks with Boy Scouts, Girl Scouts, Campfire, Jr. Daughters of St. Peter Claver & Explorer Programs | 4 | 3 | 2 | 1 | |
| 26. Networks with youth serving agencies | 4 | 3 | 2 | 1 | |

ADMINISTRATION

| | | | | | |
|---|---|---|---|---|--|
| 27. Assesses, plans, administers and evaluates comprehensive 12-month YM programs | 4 | 3 | 2 | 1 | |
| 28. Collaborates and communicates with pastoral and support staff members | 4 | 3 | 2 | 1 | |
| 29. Recruits, trains, supervises and nurtures adult and teen leaders | 4 | 3 | 2 | 1 | |
| 30. Provides for publicity of Parish Youth Ministry goals programs and activities | 4 | 3 | 2 | 1 | |

ADDITIONAL SPECIFIC RESPONSIBILITIES (Discretionary Points)

| | | | | | |
|-----|---|---|---|---|--|
| 31. | 4 | 3 | 2 | 1 | |
| 32. | 4 | 3 | 2 | 1 | |

PART TWO: GENERAL QUALIFICATIONS AND PERFORMANCE CRITERIA

| | | | | | |
|--|---|---|---|---|--|
| 33. Manages time effectively | 4 | 3 | 2 | 1 | |
| 34. Demonstrates good organization skills | 4 | 3 | 2 | 1 | |
| 35. Exhibits good communication skills | 4 | 3 | 2 | 1 | |
| 36. Demonstrates good leadership skills | 4 | 3 | 2 | 1 | |
| 37. Enhances personal spiritual and professional development | 4 | 3 | 2 | 1 | |
| 38. Ability to delegate effectively | 4 | 3 | 2 | 1 | |
| 39. Relates effectively with other ministerial associates | 4 | 3 | 2 | 1 | |
| 40. Is accessible to parishioners | 4 | 3 | 2 | 1 | |
| 41. Displays strong interpersonal skills and is able to work with others | 4 | 3 | 2 | 1 | |
| 42. Ability to locate and evaluate new resources | 4 | 3 | 2 | 1 | |

PART THREE: PERFORMANCE OF PREVIOUS YEAR'S OBJECTIVES

| | | | | | |
|-----|---|---|---|---|--|
| 43. | 4 | 3 | 2 | 1 | |
| 44. | 4 | 3 | 2 | 1 | |
| 45. | 4 | 3 | 2 | 1 | |

PART FOUR: OBJECTIVES FOR THE COMING YEAR

PART FIVE: GENERAL COMMENTS

Work, committees and projects which were performed by the youth minister on a cluster, deanery, vicariate, regional, diocesan or national level

OTHER COMMENTS (Use additional page if necessary.)

OVERALL EVALUATION RATING (AVERAGE)

TOTAL POINTS (CRITERIA 1-45) _____
 NUMBER OF APPLICABLE CATEGORIES _____
 OVERALL PERFORMANCE RATING _____
 (POINTS DIVIDED BY # OF APPLICABLE CRITERIA) _____

SIGNATURE OF REVIEWER: _____ DATE: _____

POSITION: _____

SIGNATURE OF YOUTH MINISTER*: _____ DATE: _____

**Signature does not necessarily indicate agreement with the supervisor's comments and ratings, only that the information in this document, including next year's performance objectives, was discussed by the youth minister and the supervisor.*

SALARY GUIDELINES

Please refer to the Compensation Guidelines for information about how to determine salary increases.

**ARCHDIOCESE OF CHICAGO
DIRECTOR OF MUSIC**

PERFORMANCE REVIEW

(This form may be used both for self-assessment and supervisor assessment.)

MUSICIAN: _____ DATE: _____

PARISH: _____ LAST REVIEW: _____

EVALUATOR: _____ POSITION: _____

PERFORMANCE RATINGS:

- 4. EXCEEDS JOB EXPECTATIONS
- 3. MEETS JOB EXPECTATIONS
- 2. MINIMALLY MEETS JOB EXPECTATIONS - COMMENTS REQUIRED
- 1. FAILS TO MEET THE JOB EXPECTATIONS - COMMENTS REQUIRED

NOTE: ONLY COMPLETE CRITERIA THAT APPLY TO THE CURRENT JOB DESCRIPTION

| EVALUATION CRITERIA | 4 | 3 | 2 | 1 | COMMENTS |
|---|----------|----------|----------|----------|-----------------|
| 1. Ensures appropriate music for all parish liturgical services | | | | | |
| 2. Develops assembly repertoire and weekly music selection | | | | | |
| 3. Contributes as an active member of the parish staff | | | | | |
| 4. Contributes to the liturgical committee | | | | | |
| 5. Ensures appropriate music for school services | | | | | |
| 6. Prepares and administers the music budget | | | | | |
| 7. Selects parish music sources | | | | | |
| 8. Creates seasonal and/or weekly worship aids | | | | | |
| 9. Supervises the parish musical equipment | | | | | |
| 10. Provides parish liturgical education | | | | | |

SPECIFIC MINISTRY: MUSIC DIRECTOR

| EVALUATION CRITERIA | 4 | 3 | 2 | 1 | COMMENTS |
|--|---|---|---|---|----------|
| 11. Recruits and hires professional musicians for parish events and services | | | | | |
| 12. Recruits and trains volunteer musicians | | | | | |
| 13. Actively participates in parish and community events | | | | | |
| 14. Active participant in professional groups | | | | | |
| Formation/training of liturgical music groups | | | | | |
| 15. Direct supervision: | | | | | |
| 16. | | | | | |
| 17. Indirect supervision: | | | | | |
| 18. | | | | | |
| 19. | | | | | |
| Individual skill levels as required: | | | | | |
| 20. Organ | | | | | |
| 21. Piano | | | | | |
| 22. Voice | | | | | |
| 23. Guitar | | | | | |
| 24. Other | | | | | |
| 25. Actively engages assembly participation | | | | | |
| 26. Other criteria as determined by the Director of Music and the Pastor: | | | | | |

PERFORMANCE OF PREVIOUS YEAR'S OBJECTIVES

| | | | | | |
|-----|---|---|---|---|--|
| 27. | 4 | 3 | 2 | 1 | |
| 28. | 4 | 3 | 2 | 1 | |
| 29. | 4 | 3 | 2 | 1 | |

OBJECTIVES FOR THE COMING YEAR:

OVERALL STRENGTHS OF THE MUSIC DIRECTOR'S PERFORMANCE:

AREAS IN WHICH THE MUSIC DIRECTOR CAN IMPROVE:

GENERAL COMMENTS (SUPERVISOR):

DIRECTOR OF MUSIC'S COMMENTS REGARDING THE PERFORMANCE APPRAISAL:

OVERALL EVALUATION RATING (AVERAGE)

TOTAL POINTS _____

NUMBER OF APPLICABLE CRITERIA _____

OVERALL PERFORMANCE RATING
(POINTS DIVIDED BY # OF APPLICABLE CRITERIA) _____

SIGNATURE OF REVIEWER: _____ DATE: _____

POSITION: _____

SIGNATURE OF MUSIC DIRECTOR*: _____ DATE: _____

**Signature does not necessarily indicate agreement with the supervisor's comments and ratings, only that the information in this document, including next year's performance objectives, was discussed by the music director and the supervisor.*

SALARY GUIDELINES

Please refer to the Compensation Guidelines for information about how to determine salary increases.

Deacon's Name _____

Parish or Agency _____

Review Period

(From)

(To)

ANNUAL REVIEW

Deacon Personnel Board

Archdiocese of Chicago
816 Marengo Ave
Forest Park, IL 60130
(708) 336-8900

RETURN BY JUNE 30th

Please circle the choice that best answers questions one through six

- 1. Have Ministerial Agreement commitments for Ministry of Charity and Justice been met? All Most Some None*
- 2. Have Ministerial Agreement commitments for Liturgical Ministry been met? All Most Some None*
- 3. Have Ministerial Agreement commitments for Ministry of the Word been met? All Most Some None*
- 4. Have other Ministerial commitments as defined in the Ministry Agreement been met? All Most Some None*
- 5. Have specific goals agreed upon in the Ministry Agreement been met? All Most Some None*

*** Please attach an explanation**

- 6. Has the required annual retreat been made? (If no, please give reason.) Yes No

- 7. In what way(s) has the Deacon been a positive influence to the parish or agency?

- 8. What type of development, if any, do you see as beneficial for the Deacon?

- 9. During the past year he has completed _____ hours of ministerial development.

We have discussed the above review on _____ (Date)

Deacon's Signature

Pastor's/Director's Signature

Supervisor's Signature (If not the Pastor/Director)

Archdiocese of Chicago Office of the Permanent Diaconate

Permanent deacons are called to serve the church through service, word, and liturgy. It is important for all ministers to step back periodically and reflect upon their commitment and to articulate their growth and needs in ministry. This review should be a welcome opportunity to meet with your Pastor, agency director, or supervisor to discuss the growth you have experienced, determine your effectiveness in ministry, and identify areas for future growth.

The Cardinal has called once again for all ministers to be accountable. He has mandated periodic review for all priests, deacons, and professional ministers. This is our community's response. Please take it seriously and take the responsibility of initiating the process for your own continued growth.

Any review form is only a tool. This form has been designed to be simple. The key to a successful review process is open communication between the deacon and the reviewer. This form is intended to assist you in the review communication process rather than create a paper exercise. This form is not the review and should not control the process. The best use of time in this process is in dialogue between pastor/director/supervisor and deacon.

OBJECTIVES OF REVIEW

- * Review performance of last year based on Ministry Agreement
- * Develop a mutual understanding of ministry responsibilities and expectations between pastor/director/supervisor and deacon
- * Identify areas of accomplishment, achievement, and strengths
- * Enhance and improve already acceptable performance of the deacon
- * Identify ways to better utilize a deacon's abilities, skills, and strengths in service to the community
- * Identify areas requiring further development
- * Open channels of communication between pastor/director/supervisor and the deacon
- * Identify any areas of the Ministry Agreement that require changes

SUGGESTIONS TO ASSIST IN THE REVIEW PROCESS

- * It is imperative to have the current Ministry Agreement available while completing the review process.
- * The review process should be conducted in a prayerful environment rather than a cold impersonal environment.
- * The review process is not meant to be judgmental, but to enhance personal and ministerial growth.
- * The review process should result in strengthening the overall ministry of the church, not just improve the performance of the individual.

RETURN COMPLETED REVIEW BY JUNE 30 TO THE DIACONATE OFFICE

PARISH MINISTRY REVIEW OF PERFORMANCE (Sp⁸)

 MINISTER'S NAME

 DATE

 MINISTRY TITLE/AREA OF RESPONSIBILITY

 PARISH

 TIME IN SERVICE

 PASTOR/SUPERVISOR

 POSITION

This ministry review form is designed for use by the ministerial leader and pastor/supervisor. Prior to the review meeting, the self-assessment section of the form is completed by the minister. It is then given to the pastor/supervisor, who adds his/her assessment for each area. During the review meeting the minister and supervisor:

- ▶ discuss their assessments of the previous year's performance;
- ▶ affirm the accomplishments of the year, identify and address problems, and determine potential goals and areas for growth or improvement; and
- ▶ plan for the coming year.

REVIEW OF PREVIOUS YEAR'S OBJECTIVES

| OBJECTIVE | SELF ASSESSMENT | SUPERVISOR ASSESSMENT |
|-----------|-----------------|-----------------------|
| 1. | | |
| 2. | | |
| 3. | | |

⁸ Available in Spanish (Section III)

SPECIFIC AREAS FOR REVIEW

| OBJECTIVE | SELF ASSESSMENT | SUPERVISOR ASSESSMENT |
|--|-----------------|-----------------------|
| Fosters the mission and priorities of parish through this ministry. | | |
| Consults with appropriate parish staff, other members of ministry team, and representative parishioners regarding decisions about this ministry. | | |
| Interacts in an effective manner with pastoral team and parishioners to provide coordination and ongoing development. | | |
| Recruits and trains volunteers/others to assist in ministry. | | |
| Continues to acquire & deepen essential knowledge, competencies and skills. | | |
| Exercises responsible stewardship of resources for ministry. | | |

ADDITIONAL RESPONSIBILITIES (FROM ROLE DESCRIPTION)

| OBJECTIVE | SELF ASSESSMENT | SUPERVISOR ASSESSMENT |
|-----------|-----------------|-----------------------|
| A. | | |
| B | | |
| C. | | |
| D. | | |
| E. | | |

SUMMARY OF PERFORMANCE REVIEW DISCUSSION

In this section summarize the key points of the performance review meeting including accomplishments, potential objectives, areas for growth or development and ideas for addressing problems which have surfaced during the discussion.

MINISTER'S COMMENTS REGARDING REVIEW

To be completed after the performance review meeting.

NEXT YEAR'S OBJECTIVES (please prioritize)

In this section note at least 3 objectives for the coming year. (See Section I, Planning for Performance)

SIGNATURE OF MINISTER*

DATE

SIGNATURE OF SUPERVISOR

DATE

**Signature does not necessarily indicate agreement with the supervisor's comments and ratings, only that the information in this document, including next year's performance objectives, was discussed by the minister and the supervisor.*

ANNUAL REVIEW OF MINISTRY (Sp)⁹

Reviewer Copy

Name of Minister _____ Title _____

Name of Reviewer¹⁰ _____ Date _____

A. Both the minister and the reviewer(s) answer the following questions in preparation for the performance feedback meeting. A copy of the role description and yearly objectives/goals are provided for each reviewer.

1. How has the minister fulfilled his or her responsibilities as described in the role description and objectives? Note specific examples.
2. What have been the major accomplishments of the minister this past year?
3. How does the minister utilize planning skills: visioning for the future; long range planning, organization and coordination for implementation?
4. How does the minister relate to other members of the staff and to parishioners? How does she or he collaborate and communicate with others?
5. How has the person demonstrated:
 - accountability?
 - responsibility?
 - dependability?
 - flexibility?
6. How could this person enhance or improve his or her ability to minister?
7. What assistance/support/resources will be offered to aid this minister in fulfilling his/her responsibilities?
8. Additional Reflections:

B. During the review meeting the minister and reviewer:

- ▶ discuss their responses;
- ▶ affirm the accomplishments of the year, identify and address problems, and determine potential goals and areas for growth or improvement; and
- ▶ plan for the coming year.

C. At the close of the meeting, they complete and sign a summary of the key points of the discussion (accomplishments, areas for improvement, potential role modifications, areas for development.) A copy of the next year's objectives and a revised role description (when finalized) should be attached to the summary.

⁹ Sp = Available in Spanish (Section III)

¹⁰ The pastor, supervisor or other designated person (s)

ANNUAL REVIEW OF MINISTRY**Minister Copy**

Name of Minister _____ Title _____

Name of Reviewer¹¹ _____ Date _____

- A. Both the minister and the reviewer(s) answer the following questions in preparation for the performance feedback meeting. A copy of the role description and yearly objectives/goals is provided for each reviewer.
1. How have I fulfilled my responsibilities as described in my role description and objectives? Note specific examples.
 2. What have been my major accomplishments this past year?
 3. How do I utilize planning skills: visioning for the future, long range planning, organization and coordination for implementation?
 4. How do I relate to other members of the staff and to parishioners? How do I collaborate and communicate with others?
 5. How have I demonstrated:
 - accountability?
 - responsibility?
 - dependability?
 - flexibility?
 6. How could I enhance or improve my ability to minister?
 7. What assistance/support/resources would help me minister better?
 8. Other reflections:
- B. During the review meeting the minister and reviewer:
- ▶ discuss their responses;
 - ▶ affirm the accomplishments of the year, identify and address problems, and determine potential goals and areas for growth or improvement; and
 - ▶ plan for the coming year.
- C. At the close of the meeting, they complete and sign a summary of the key points of the discussion (accomplishments, areas for improvement, potential role modifications, areas for development.) A copy of the next year's objectives and a revised role description (when finalized) should be attached to the summary.

¹¹ The pastor, supervisor or other designated person (s)

ANNUAL REVIEW OF MINISTRY

Summary

Name of Minister _____ Title _____

Name of Reviewer _____ Date _____

The key conclusions of the review discussion are documented in the space below. A copy of the next year's objectives (and a revised role description) are attached. The minister receives a copy for his/her personal file and a copy is maintained in the local personnel file. (See Section I, "Planning for Performance" for information on preparing objectives.)

Minister signature* _____

Date _____

Reviewer signature(s) _____

Date _____

*Signature does not necessarily indicate agreement with the supervisor's comments and ratings, only that the information in this document, including next year's performance objectives, was discussed by the minister and the supervisor.

Date of Review _____
ARCHDIOCESE OF CHICAGO
PERFORMANCE REVIEW
Support Staff (Sp)¹²

| | | |
|---------------|-------------------------------|---|
| Employee Name | / / Hire Date (mm/dd/yyyy) | Job Title |
| Parish | Supervisor | Time in Position _____ / Year/Months |

The employee completes a self-assessment for each item in sections I, II, and III. The supervisor reviews the self-assessment, completes his/her assessment (and determines a numerical rating¹³). During the review meeting the supervisor and support staff member: discuss their assessments of the previous year's performance; affirm the accomplishments of the year, identify and address problems, and determine potential goals and areas for growth or improvement; and plan for the coming year.

I. ASSESSMENT OF KEY COMPETENCIES AND SKILLS

| SKILL/ COMPETENCY | SELF ASSESSMENT | EVALUATOR ASSESSMENT | RATING |
|--|-----------------|----------------------|--------|
| <u>Job Knowledge:</u> Has general and technical knowledge to perform responsibilities of position. Learns new skills for improved effectiveness in position. | | | |
| <u>Work Quality:</u> Performs duties within required expectations. Takes initiative. Is self-motivated. Completely and thoroughly carries out assignments and instructions. Demonstrates flexibility by assisting other support staff when appropriate. | | | |
| <u>Communication:</u> Keeps supervisor and co-workers appropriately informed of work progress and work related issues. Understands and carries out verbal and written instructions to satisfactorily complete day to day responsibilities. Requests clarification when necessary. Conveys messages accurately, demonstrates verbal and written skills as appropriate for the position. | | | |

¹² Sp = Available in Spanish (Section III)

¹³ Use of numerical ratings is optional. If used, criteria and system for determining the rating should be clear and objective. The following ratings may be used: 5) Consistently exceeds expectations; 4) Consistently meets and sometimes exceeds expectations; 3) Consistently meets expectations; 2) Needs improvements; 1) Consistently fails to meet expectations.

| SKILL/ COMPETENCY | SELF ASSESSMENT | EVALUATOR ASSESSMENT | RATING |
|--|-----------------|----------------------|--------|
| <p><u>Human Relations:</u> Exercises courtesy and professionalism in dealing with others. Demonstrates respect for others regardless of their ethnic background, race, gender or disabilities. Works with others to secure cooperation and promote teamwork. Shows an appropriate level of hospitality and sensitivity for role within the Church.</p> | | | |
| <p><u>Dependability:</u> Completes assigned tasks with little or no supervision. Can be relied upon to be present and on time. Puts forth extra effort when needed.</p> | | | |

II. REVIEW OF KEY RESPONSIBILITIES

In each section below the employee indicates a key responsibility, and completes a self-assessment of the fulfillment of the responsibility using the performance indicators determined at the beginning of the year. The supervisor reviews the self-assessment, completes his/her assessment, and determines a numerical rating (optional).

| | |
|---------------------|---------------------------|
| a. Responsibility: | d. Rating: |
| b. Self Assessment: | c. Supervisor Assessment: |

| | |
|---------------------|---------------------------|
| a. Responsibility: | d. Rating: |
| b. Self Assessment: | c. Supervisor Assessment: |

(This page may be duplicated as necessary.)

| | | |
|---------------------|---------------------------|------------|
| a. Responsibility: | | d. Rating: |
| b. Self Assessment: | c. Supervisor Assessment: | |

| | | |
|---------------------|---------------------------|------------|
| a. Responsibility: | | d. Rating: |
| b. Self Assessment: | c. Supervisor Assessment: | |

| | | |
|---------------------|---------------------------|------------|
| a. Responsibility: | | d. Rating: |
| b. Self Assessment: | c. Supervisor Assessment: | |

III. REVIEW OF PROFESSIONAL DEVELOPMENT GOAL

In the section below the employee states the professional development goal, which was to be completed during the past year and completes a self-assessment of the fulfillment of the goal. The supervisor reviews the self-assessment, completes his/her assessment, and determines a rating.

| | | |
|-----------------------------------|---------------------------|------------|
| a. Professional Development Goal: | | d. Rating: |
| b. Self Assessment: | c. Supervisor Assessment: | |

IV. OVERALL RATING

| | | |
|---|----|----|
| Indicate: a. the overall average numerical rating (sum of ratings divided by number of factors rated) and/or b. the descriptive rating (e.g. Meets expectations, etc.) for this employee's performance: | a. | b. |
| | | |

Supervisor Comments:

Employee Comments (to be completed after the review meeting):

Employee* signature

Date

Supervisor signature

Date

**Signature does not necessarily indicate agreement with the supervisor's comments and ratings, only that the information in this document, including next year's performance objectives, was discussed by the employee and the supervisor.*

Inter-Staff Feedback Reflection Form A (Short)

Name of Feedback Recipient _____

Name of Feedback Provider _____

(Prior to using this reflection page, the staff should have agreed upon the criteria or behaviors about which they will provide feedback to one another. They should also have agreed on how they will offer the feedback to one another. Staff members can use this worksheet to note their feedback regarding one another. Each staff member should also assess him/herself.)

Qualities, criteria, behaviors for feedback:

| | |
|-------|-------|
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |

1. Indicate the feedback recipient's strengths in the areas listed above. Note specific examples when these strengths were demonstrated.

2. Indicate areas or opportunities for growth or improvement for this feedback recipient. Again, indicate specific examples of how the person might improve.

Inter-Staff Feedback Reflection Form B

- *This form is designed as a model for staff members to reflect on specific ministry/work criteria for themselves and for other staff members prior to offering feedback to one another in a group setting. It is preferable that staff discuss and modify the criteria for their particular situation, and that they discuss the method by which they will offer feedback to one another.*
- *Ratings: N= Not applicable/don't know; Scale of 7-1 with 7 as the highest (outstanding) and 1 as the lowest.*

Name of Feedback Recipient _____

Name of Feedback Provider (optional)_____

Communication

N 7 6 5 4 3 2 1

Presents ideas effectively in formal and informal situations. Conveys thoughts clearly and concisely. Listens well and asks appropriate questions. Communicates well in writing. Reviews letters, memos and reports to assure accuracy. Keeps other staff members and co-workers informed.

Comments:

Interpersonal Skills

N 7 6 5 4 3 2 1

Expresses emotions appropriately. Initiates friendly interactions. Provides positive and negative feedback appropriately. Interacts effectively with pastor, other staff members, leadership groups, ministers, and parishioners. Collaborates well. Accepts positive and negative feedback. Faces and resolves conflict.

Comments:

Problem Solving and Decision Making

N 7 6 5 4 3 2 1

Recognizes problems and opportunities. Uses resources in solving problems. Solves problems systematically. Fully resolves problems. Makes good decisions. Develops new solutions.

Comments:

Priority Setting

N 7 6 5 4 3 2 1

Sets appropriate priorities. Uses time effectively. Plans and organizes work. Oversees and follows up to assure work completion.

Comments:

Job Knowledge

N 7 6 5 4 3 2 1

Understands the responsibilities of his/her position. Has academic, technical and/or general knowledge to perform responsibilities of position. Demonstrates overall knowledge of parish priorities. Seeks professional development and shows evidence of professional growth.

Comments:

Personal Qualities

N 7 6 5 4 3 2 1

Is able to work independently. Shows appropriate assertiveness/initiative. Is able to make mistakes and learn from them. Maintains poise under the normal pressures and strains of the position. Tends to be patient, adaptable and flexible. Has an active spiritual life.

Comments:

Mission

N 7 6 5 4 3 2 1

Promotes the mission and priorities of the parish and Archdiocese. Places a high priority on service to the people of the parish. Knows and respects Church teaching. Understands other parish ministries and work as they relate to his/her ministry/work.

Comments:

Ministry

N 7 6 5 4 3 2 1

Sees that persons sharing in his/her ministry develop an understanding and practical ability in that area. Knows and communicates the current status of the ministerial work for which he/she is responsible; maintains accurate records. Effectively recruits and guides parishioners into the ministry for which he/she is responsible.

Comments:

Areas of Strength:

Suggestions for Growth:

POSITION DESCRIPTIONS

The position description is an important tool for communicating and clarifying the specific tasks and functions that define an employee's job. It is also useful for establishing performance objectives and standards. The following are the key elements that should be included in all job descriptions for employees at your parish:

JOB TITLE

The job title should be appropriate for the duties of the position, and should not presently be in use to describe any other position with different responsibilities at your parish.

REPORTS TO

To avoid the confusion that sometimes results from informal reporting relationships, it is important that you identify, by job title, the person to whom the employee officially reports. This should be the individual who will conduct the employee's performance review.

DIRECT SUBORDINATES

In order to accurately describe the scope of responsibility associated with an employee's position, it is important that you identify, by job title, any positions that report directly to the employee. Direct subordinates will include only those positions for which the employee has authority to hire, fire, initiate disciplinary action, review performance and make salary recommendations. If final authority for these decisions rests with the pastor, the employee must at least have significant input in such decisions in order to be considered to have responsibility for direct subordinates.

BASIC FUNCTION

In preparing this part of the position description, the basic function of the position should be described briefly and in general terms. Generally, a two or three sentence summary of the primary duties and responsibilities will be sufficient.

DUTIES AND RESPONSIBILITIES

In this section, it is important to list the duties and activities for which the employee in this position will be held accountable. This list must be as specific and complete as possible, including the frequency with which duties are to be performed, where appropriate. However, avoid getting hung up on detail. If the employee is responsible for preparing a particular report, for example, it may not be necessary to itemize the five or six steps required to prepare the report. Also, do not list duties that are not truly a function of this position, but may traditionally be handled by a particular person (e.g. the business manager who likes to water the plants.)

EEOC JOB CLASSIFICATION

This is a code used by the federal government in various reports, you may be asked at some point to complete. It describes the nature of the work required of the employee in a particular position. At your parish, you are likely to deal with four such classifications: OM-Officials and Managers, PR-Professional, OC-Office Clerical and SW-Service Workers. **Officials and Managers** are those who supervise the work of two or more employees, hire, fire, initiate disciplinary action, review performance and make salary recommendations for subordinate employees. Pastors, principals and business managers fall into this category. Please note that working supervisors who spend a majority of their time performing the same duties as the individuals they supervise are not truly supervisors, and are not classified as officials and managers. **Professionals** are those who are engaged in an occupation that generally requires a college degree in a specific field. Teachers, Directors of Religious Education, Pastoral Associates, Music Ministers and the various other professional lay ministry positions fall into this category.

Office Clerical employees are those employed in support staff functions in an office environment. Secretaries, bookkeepers, library workers and receptionists fall into this category. **Service Workers** are employees who provide non-administrative support staff services. Janitors, custodians, maintenance workers, maintenance supervisors who spend a majority of their time performing the same duties as the other maintenance employees, cooks and housekeepers fall into this category.

EXEMPT/NON-EXEMPT STATUS

Exempt employees are generally called salaried employees because they are not paid by the hour, and are not eligible for overtime pay. The federal government has defined the types of employees who may legitimately be classified as exempt or salaried employees. At our parishes, exempt employees are those who fall into the categories of **Officials and Managers** and **Professionals** as described above. All employees who fall into the categories of **Office Clerical** or **Service Workers** are non-exempt employees. They are required to report all hours worked each week on a time card or time sheet, and they must be paid time and a half for any hours actually worked in excess of forty in the same work week.

ESSENTIAL FUNCTIONS

These are functions that are so essential to the position that if an individual cannot perform them, even with a reasonable accommodation to assist someone with a disability, that individual cannot be employed in the position. Duties and functions that are relatively unimportant to the primary functions of a position, or those that could be easily assigned to another employee, should not be indicated as essential functions. The Americans with Disabilities Act requires all employers to identify the essential functions of all their positions.

The following is a sample position description that incorporates all of the key elements listed above.

**Archdiocese of Chicago
Position Description**

4/95
OC/NEX

Title: Secretary

Reports to: Director, Human Resources

Direct Subordinates: None

Basic Functions

Answers phones, schedules appointments, types, copies and files various correspondence and reports, and provides general secretarial and office services to the Director.

Duties and Responsibilities

- 1.* Answers phones and screens calls for the Director
- 2.* Responds to phone requests from the parishes and agencies by providing general information regarding benefits and other Human Resource procedures.
- 3.* Types correspondence and various reports using a standard electric typewriter and word processing software on a personal computer. Sends rejection letters to unsuccessful candidates.
4. Uses PC graphic software to prepare special notices and job postings.
- 5.* Maintains Director's files in an orderly fashion; purges files and sends them to Archives annually.
6. Prepares special mailings and other projects as needed.
- 7.* Greets visitors, and announces them to the appropriate member of the Human Resources staff.
- 8.* Schedules meetings and appointments for the Director; maintains the Director's calendar.
- 9.* Arranges for the use of conference rooms and ensures that all necessary equipment, refreshments, etc. are available for meetings.
10. Drafts own correspondence in response to general requests from parishes and agencies. May draft correspondence for the Director.
11. Makes travel and lodging arrangements for the Director and Associate Director, as necessary in connection with conferences and business travel.
12. May provide assistance to other members of Human Resources staff, as needed.
- 13.* Opens and sorts mail for the Director.
- 14.* Processes invoices and check requests for the agency.
15. May review resumes and conduct preliminary phone screening of applicants.
16. May take minutes at meetings.
- 17.* Coordinates temporary help for the Pastoral Center and near-by off-campus locations.
- 18.* Maintains supply inventory for the agency.
- 19.* Provides secretarial support to the Associate Director, as needed.
- 20.* May be given various other assignments and projects consistent with the responsibility level and general duties as a secretary.

*** Denotes essential functions of this position, in conjunction with the Americans with Disabilities Act.**

SECTION III

MATERIALS IN SPANISH

GUÍA PARA LA REVISIÓN DE RENDIMIENTO DE TRABAJO EMPLEADOS DEL MINISTERIO PARROQUIAL (EMP)

El Empleado del Ministerio Parroquial

Hará su propia evaluación

1. Se basará en las metas de la misión de la parroquia
2. Seguirá la descripción y objetivos de su trabajo
3. Usará ejemplos concretos
4. Incorporará el “feedback” de las personas servidas en su ministerio
5. Antes de la reunión de revisión dará al supervisor una copia de su auto evaluación

El Supervisor

Hará la evaluación del emp

1. Se basará en las metas de la misión de la parroquia
2. Seguirá la descripción y objetivos del trabajo del emp
3. Revisará los ejemplos concretos dados por el emp
4. Revisará el “feedback” del ministerio del emp
5. Revisará la auto-evaluación del emp
6. Antes de la reunión de revisión dará al emp una copia de su evaluación

El Supervisor y el EMP

1. Fijarán la fecha para la reunión de revisión
2. Escogerán un lugar apropiado para reunirse donde las interrupciones sean mínimas
3. Cada uno preparará un bosquejo de metas a seguir para el año entrante facilitando así entendimiento mutuo y mejor planeación

El Supervisor tendrá en cuenta:

- ◆ No basar su juicio en primeras impresiones ya sean favorables o desfavorables.
- ◆ Evitar hacer generalizaciones al hacer la evaluación
- ◆ Evitar el juzgar más favorablemente a aquellos que tienen alguna semejanza con usted
- ◆ Evitar evaluar **siempre** al EMP en el punto medio de rendimiento
- ◆ Evitar las dos tendencias: demasiada rigidez o demasiada condescendencia

La discusión del rendimiento de trabajo

Después de que el EMP y el supervisor han recibido y estudiado las respectivas evaluaciones, se reunirán de acuerdo con la fecha acordada para la discusión del rendimiento.

Durante la reunión el supervisor deberá proporcionar un ambiente de confianza que facilite el diálogo. Deberá también usar el “feedback” en lugar de crítica negativa.

El proceso a seguir será:

1. El EMP presenta su evaluación y aclara sus puntos
2. El supervisor presenta su evaluación, escucha y ofrece “feedback” basado en sus observaciones
3. Discuten y analizan la realidad del rendimiento obtenido ante la meta fijada
4. Resuelven problemas concretos con miras a las metas del próximo año
5. Elaboran un plan de acción práctico y alcanzable
6. Repasan de nuevo todos los puntos de la evaluación
7. Si queda algún punto sin resolver fijarán una fecha para hacerlo
8. El “feedback” del rendimiento se usará consistentemente durante el año como un apoyo de motivación

REVISIÓN DEL MINISTERIO “FEEDBACK”

Aquí se encuentran una serie de preguntas que podrán ser usadas por los ministros líderes cuando pidan una información “feedback” a voluntarios que ayudan en el ministerio.¹⁴ Otros métodos para obtener “feedback” comprenden una evaluación completa del ministerio como *Harvesting Hope*, para catequesis en las parroquias; encuestas o grupos de enfoque de participantes en un programa/servicio, tales como miembros del grupo de juventud, el grupo de estudio de Biblia, parejas en un programa de preparación para matrimonios, padres de niños en un programa de educación religiosa, etc.

Ejemplo de introducción

Como parte de mi revisión anual, busco “feedback” de personas que han recibido servicio con mi ministerio. Reflexionando en esta información tendré una visión más completa de mis capacidades y de las áreas en las cuales debo crecer en el ministerio. Les agradezco mucho su tiempo y una reflexión en oración a las siguientes preguntas.

Por favor tengan la bondad de devolver esta forma completa a (Escriba el nombre y dirección de la persona a la que se deberá enviar este informe.) (Escriba la fecha para la que deberán entregar el informe.)

Firma del ministro

Ejemplos de preguntas

- Explique cómo este ministro líder, le ha ayudado a ejercer su ministerio durante el año.
¿De qué manera le ha apoyado?

¿Cómo se ha sentido frustrado?

- ¿Cómo le ha ayudado este ministro líder a desarrollar sus talentos y a trabajar creativamente dentro del área de su ministerio?
- ¿Cómo considera que la oración es un aspecto importante en el ministerio de esta persona? ¿De qué manera le ha sugerido diferentes modos de oración y cómo le ha animado a crecer en su propia vida de oración?

¹⁴Tomado de preguntas creadas por los grupos de las parroquias St Edna y St Francis Xavier (La Grange)

- ¿De qué forma el entrenamiento ofrecido por el ministro líder, le ha apoyado en su trabajo ministerial?
 - a. ¿Qué oportunidades se han ofrecido de formación/ educación/ entrenamiento?
 - b. ¿Cuáles de estas oportunidades ha podido usar?
 - c. ¿Cuáles de estas oportunidades han sido apropiadas para sus necesidades? ¿Para las necesidades de las personas a quienes usted sirve en su ministerio?

- ¿Cómo le ha ayudado la comunicación con el ministro líder para mantenerse informado?

- ¿Cómo ha podido ser más efectiva esta comunicación?

- ¿Cómo ha demostrado el ministro líder profesionalismo y ha facilitado el acudir a el/ella en su liderazgo ministerial?

- ¿Encuentra este ministerio agradable y satisfactorio? (SI - NO) Explíque.

- ¿Cuáles cree que han sido los logros más importantes de este ministro líder durante este año pasado?

REVISIÓN DEL RENDIMIENTO DEL MINISTERIO PARROQUIAL

NOMBRE DEL EMPLEADO DEL MINISTERIO

FECHA

TITULO DEL EMPLEADO DEL MINISTERIO-AREA DE RESPONSABILIDAD

PARROQUIA

TIEMPO EN ESTE SERVICIO

NOMBRE DEL PÁRROCO-SUPERVISOR

POSICIÓN

Esta forma es para el uso del ministro parroquial y del párroco o del supervisor. Antes de la reunión de revisión el ministro debe haber terminado su propia evaluación y la presentará al párroco o al supervisor, el cual añadirá su evaluación para cada área. (Tanto el párroco/supervisor como el ministro tienen la opción de usar las **Guías para la revisión de empleados del ministerio parroquial.**)

Durante la reunión de revisión el ministro y el supervisor:

- Discutirán sus evaluaciones sobre el rendimiento del año anterior
- Verificarán los logros obtenidos durante el año, identificarán y aclararán problemas y determinarán las metas potenciales, las áreas de crecimiento y de mejora y;
- Elaborarán el plan para el próximo año

REVISIÓN DE LOS OBJETIVOS DEL AÑO ANTERIOR

| OBJETIVO | AUTO-EVALUACIÓN | EVALUACIÓN DEL SUPERVISOR |
|----------|-----------------|---------------------------|
| 1. | | |
| 2. | | |
| 3. | | |

ÁREAS CONCRETAS PARA LA REVISIÓN

| RESPONSABILIDAD | AUTO-EVALUACIÓN | EVALUACIÓN DEL SUPERVISOR |
|--|-----------------|---------------------------|
| Fomenta la misión y las prioridades de la parroquia en su ministerio | | |
| Consulta con el debido personal de la parroquia con otros miembros del equipo ministerial y con representantes de los parroquianos sobre decisiones que afectan al ministerio. | | |
| Se comunica apropiadamente con los miembros del equipo parroquial y con los parroquianos con el fin de facilitar coordinación y continuación en el ministerio. | | |
| Recluta y entrena voluntarios y otras personas para que ayuden en el ministerio. | | |
| Continúa adquiriendo y profundizando sus conocimientos básicos, competencias y capacidades. | | |
| Administra responsablemente los recursos del ministerio. | | |

OTRAS RESPONSABILIDADES TOMADAS DE LA DESCRIPCIÓN DEL TRABAJO

| RESPONSABILIDAD | AUTO-EVALUACIÓN | EVALUACIÓN DEL SUPERVISOR |
|-----------------|-----------------|---------------------------|
| A. | | |
| B. | | |
| C. | | |
| D. | | |
| E. | | |

RESUMEN DE LA DISCUSIÓN SOBRE EL RENDIMIENTO

En esta sección el supervisor hace un resumen de los puntos claves tratados en la reunión de evaluación incluyendo logros obtenidos, objetivos potenciales, áreas de crecimiento o de mejora, así como ideas enfocando problemas que hayan surgido durante la discusión.

COMENTARIOS DEL MINISTRO PARROQUIAL SOBRE EL RESUMEN DEL RENDIMIENTO

Deberán escribirse después de la reunión

OBJETIVOS PARA EL PROXIMO AÑO POR ORDEN DE PRIORIDAD

En esta sección se escribirán los objetivos para el próximo año.

| |
|----|
| A. |
| B. |
| C. |

Firma del empleado del ministerio

Fecha

Firma del supervisor

Fecha

REVISIÓN ANUAL DEL MINISTERIO

Copia para el revisor¹⁵

Nombre del ministro _____ Título _____

Nombre del revisor _____ Fecha _____

- A. Tanto el ministro como el revisor(s) contestan las siguientes preguntas como preparación para la reunión de revisión. A cada revisor se le dará con una copia con la descripción del trabajo y de los objetivos/metas del año.
- B. Durante la reunión de revisión el ministro y el revisor:
- ◆ discutirán sus respuestas
 - ◆ confirmarán los logros obtenidos durante el año, identificarán y tratarán problemas concretos, determinarán metas potenciales y áreas de crecimiento o de mejora; y
 - ◆ establecerán un plan concreto para el año próximo
- C. Al cerrarse la reunión completarán y firmarán un resumen de los puntos principales tratados durante la discusión (logros obtenidos, áreas por mejorar, posibles modificaciones en el trabajo, áreas por desarrollar.) Una copia de los objetivos para el año próximo y la descripción del trabajo (cuando esté terminada) deberán adjuntarse con el resumen.

El ministro.

1. ¿Cómo ha cumplido las responsabilidades y los objetivos detallados en la descripción del trabajo? Anote ejemplos concretos.

2. ¿Cuáles han sido sus logros más importantes durante este año?

¹⁵El párroco, supervisor, u otras personas designadas

Sistema de planeación:

3. ¿Cómo ha utilizado los planeamientos?: visión del futuro; planeamiento a largo plazo, organización y coordinación para implementar los planes.

4. ¿Cómo se ha relacionado con otros empleados en el trabajo y con los parroquianos?

¿Cómo se ha comunicado y colaborado con los demás?

5. ¿Cómo ha demostrado su:

capacidad de rendir cuentas de su trabajo

responsabilidad

dependencia (se puede contar con el/ella)

flexibilidad?

6. ¿Cómo puede aumentar o mejorar su servicio ministerial?

7. ¿Qué ayuda/apoyo/recursos se le pueden ofrecer para mejor llenar sus responsabilidades?

8. Otras reflexiones:

Mi sistema de planeación:

3. ¿Cómo he utilizado los planeamientos?: visión del futuro; planeamiento a largo plazo, organización y coordinación para implementar los planes.

4. ¿Cómo me he relacionado con otros empleados en el trabajo y con los parroquianos?

¿Cómo me he comunicado y colaborado con los demás?

5. ¿Cómo he demostrado mi:

capacidad de rendir cuentas de mi trabajo

responsabilidad

dependencia (se puede contar conmigo)

flexibilidad?

6. ¿Cómo puedo aumentar o mejorar mi servicio ministerial?

7. ¿Qué ayuda/apoyo/recursos me pueden ofrecer para mejor llenar mis responsabilidades?

9. Otras reflexiones:

REVISIÓN ANUAL DEL MINISTERIO

Nombre del ministro _____ Parroquia _____

Nombre del revisor _____ Fecha _____

La clave de las conclusiones de la revisión están documentadas en el espacio de esta página. Una copia de los objetivos del año próximo (y una descripción revisada del trabajo) vienen aquí también. El ministro recibe una copia para su archivo personal y otra copia se guarda en el archivo.

Firma del ministro _____ Fecha _____

Firma del revisor(es) _____ Fecha _____

_____ Fecha _____

_____ Fecha _____

ARQUIDIÓCESIS DE CHICAGO REVISIÓN DEL RENDIMIENTO Personal de asistencia¹⁶

Fecha de la revisión _____

Nombre del empleado _____ Fecha de empleo(mes/día/año) _____ Trabaja como _____
 Parroquia _____ Nombre del supervisor _____ Tiempo en esta posición _____ / _____
 Años/meses

El empleado completa su propia evaluación sobre cada uno de los puntos de la sección I, II y III. El supervisor revisa la evaluación y la completa (dando una evaluación numérica.¹⁷) Durante la reunión el supervisor y el empleado de asistencia discuten sus revisiones del año pasado; confirman los logros del año, identifican problemas, determinan posibles metas, áreas de crecimiento o de mejoras; y hacen el plan para el año próximo.

I. EVALUACION DE COMPETENCIAS Y CAPACIDADES CLAVES

| COMPETENCIAS/ CAPACIDADES | AUTO-EVALUACIÓN (EMPLEADO) | EVLUACIÓN DEL SUPERVISOR | EVALUACIÓN |
|---|----------------------------|--------------------------|------------|
| <u>Conocimiento del trabajo:</u> Conocimiento general y técnico para desempeñar responsablemente las obligaciones de su cargo. Aprende nuevos métodos para mejorar y ser más efectivo en su posición. | | | |
| <u>Calidad del trabajo:</u> Realiza los deberes dentro de lo que se espera. Toma iniciativas. Está auto- otivado. Completa perfectamente las órdenes y sigue las instrucciones. Es flexible ayudando a otro personal asistente cuando es apropiado. | | | |
| <u>Comunicación:</u> Mantiene al supervisor y compañeros de trabajo adecuadamente informados del progreso del trabajo y de lo relacionando con el mismo. Entiende y ejecuta instrucciones verbales y escritas para cumplir satisfactoriamente sus responsabilidades diarias. Pide aclaración cuando es necesario. Da los mensajes con exactitud. Demuestra capacidad oral y escrita para desempeñar apropiadamente su posición. | | | |

¹⁶ El personal de asistencia de la escuela puede usar las formas OCE.

¹⁷ El uso de la evaluación numérica es opcional. Si se emplea, debe ser por medio de una escala clara y objetiva. Los siguientes números pueden usarse. 5) Siempre más de lo esperado. 4) Llega a lo que se esperaba, a veces más de lo esperado. 3) Llega a lo que se esperaba. 2) Necesita mejorar. 1) Falla constantemente, no llega a lo esperado.

PERSONAL DE ASISTENCIA

| | | | |
|--|--|--|--|
| <p><u>Relaciones humanas:</u> Es cortés y profesional en el trato con los demás. Demuestra respeto por otros sin tener en cuenta su grupo étnico, su pasado, raza, sexo o incapacidad corporal. Trabaja con otros para asegurar cooperación y promover trabajo de equipo. Muestra un nivel adecuado de hospitalidad y sensibilidad para trabajar dentro de la Iglesia.</p> | | | |
| <p><u>Dependencia:</u> Completa los trabajos ordenados con poca o ninguna supervisión. Se puede confiar en su asistencia y puntualidad. Cuando urge algún trabajo, pone más interés y esfuerzo.</p> | | | |

II. REVISIÓN DE LAS RESPONSABILIDADES CLAVES

En cada una de las secciones siguientes el empleado indica una responsabilidad principal y completa su propia evaluación usando la escala de competencia determinada al principio del año. El supervisor repasa la evaluación hecha por el empleado y determina una escala de evaluación. (opcional)

| | |
|-------------------------------|----------------|
| a. Responsabilidad | |
| b. Comentarios del empleado | |
| c. Comentarios del supervisor | d . Evaluación |

(Esta página se puede duplicar si es necesario.)

| | |
|-------------------------------|----------------|
| a. Responsabilidad | |
| b. Comentarios del empleado | |
| c. Comentarios del supervisor | d . Evaluación |

| | |
|-------------------------------|----------------|
| a. Responsabilidad | |
| b. Comentarios del empleado | |
| c. Comentarios del supervisor | d . Evaluación |

| | |
|-------------------------------|----------------|
| a. Responsabilidad | |
| b. Comentarios del empleado | |
| c. Comentarios del supervisor | d . Evaluación |

III. REVISIÓN DE LA META PROGRAMADA PARA EL AÑO

En la sección de abajo el empleado escribe la meta que ha sido completada durante el año pasado y completa su propio comentario. El supervisor revisa los comentarios del empleado, completa escribiendo sus propios comentarios y determina una escala de evaluación.

| | |
|-------------------------------|---------------|
| a. Meta | |
| b. Comentarios del empleado | |
| c. Comentarios del supervisor | d. Evaluación |

IV. EVALUACIÓN GENERAL

| | | |
|--|----|----|
| <p>Escriba (a) el promedio numérico general de las escalas de evaluación (suma las escalas y divídalas por el número de evaluaciones) y (b) la escala descriptiva (e.g. Llena las expectativas, etc) del desempeño del empleado.</p> | a. | b. |
|--|----|----|

Comentarios del supervisor:

Comentarios del empleado: (han de ser hechos después de la reunión de revisión)

Empleado

Fecha

Supervisor

Fecha

PLAN DE RENDIMIENTO
(Esta página se puede duplicar si es necesario.)
 AÑO: _____

Nombre _____

Posición que desempeña _____

En la sección de abajo indique de 3 a 6 responsabilidades y de 1 a 2 metas de rendimiento sobre las que va a enfocar durante el año que entra. (Puede usar otra página si es necesario.) Haga notar rendimientos en el trabajo en los cuales va a enfocar los logros de estas responsabilidades al final del año. Por favor recuerde que debe hacer un ajuste si estas responsabilidades cambian drásticamente durante el año.

E.g. Responsabilidad: Organizar y mantener los ficheros a fin de tenerlos al día y de fácil acceso.

Objetivo: Cambiar el material del fichero de los parroquianos.

Entrar en la computadora la información de los ficheros de los parroquianos.

| Responsabilidad | Objetivo(s) de rendimiento |
|-----------------|----------------------------|
| | |

| Responsabilidad | Objetivo(s) de rendimiento |
|-----------------|----------------------------|
| | |

| Responsabilidad | Objetivo(s) de rendimiento |
|-----------------|----------------------------|
| | |

| Meta de rendimiento |
|---------------------|
| |

SECTION IV

ANNUAL REVIEW OF MINISTRY

FOR PRIESTS

ANNUAL REVIEW OF PERFORMANCE OF MINISTRY FOR PRIESTS

Purposes:

- A. Growth in ministry
 - ✓ To affirm personal and ministerial strengths and areas of recent growth
 - ✓ To identify areas for future personal and ministerial growth
 - ✓ To follow through on a plan (long and short range) for personal and ministerial growth, which builds on strengths and addresses growth areas identified through assessment feedback
- B. Accountability for ministry
 - ✓ To provide a regular means of accountability for ministry and ministerial development

Process:

| Steps for Annual Review | Suggested Timeline |
|---|----------------------|
| <p>Groundwork</p> <ul style="list-style-type: none"> ▪ The priest discusses with his reviewer his ministry agreement and clarifies his responsibilities and ministerial goals for the upcoming year, including at least one developmental goal. (Priests who have recently experienced a periodic review or traditional first or second term pastor review are encouraged to consider that feedback in preparing goals.) ▪ He records his ministry goals on the <i>Annual Ministry Plan</i>. ▪ He plans to meet with his reviewer(s) as needed throughout the year and in August for the annual review meeting. ▪ He may also identify the format he will use for his review. He may use only the Review Summary (see next page) or more detailed alternate forms A or B which can also be found in <i>Archdiocesan Resources for Performance Review and Planning</i> available on the Archdiocesan website (www.archdiocese-chgo.org) or from the Office of Ministerial Evaluation. | August/ September |
| <p>Periodic review of progress in accomplishing responsibilities and goals</p> | On-going |
| <p>Review</p> <ul style="list-style-type: none"> ▪ The priest schedules a review meeting with his reviewer. ▪ He assesses his ministry and presents it to his reviewer. ▪ They meet to discuss the assessment and complete a review summary, adjust the ministry agreement, if necessary, and set goals for the coming year. ▪ Note: He may also complete a personal reflection at this time and discuss this with a spiritual director or another person of his choosing. | August |
| <p>The Annual Review of Performance of Ministry Summary</p> <ul style="list-style-type: none"> ▪ Notes highlights of review discussion: accomplishments, challenges and recommendations. ▪ Contains necessary signatures. ▪ Retention is yet to be determined. | August |

ANNUAL MINISTRY PLAN

Name _____ Date _____

After discussing with your reviewer your ministry agreement/position responsibilities and ministry over the past year, and your most recent Periodic Review feedback or previous goals if applicable, formulate your ministry goals for the coming year. Retain a copy of the plan for next year's review. Be sure to include goal(s) for ministerial development.

Priest's Signature _____

Date _____

Reviewer's Signature _____

Date _____

SUMMARY: ANNUAL REVIEW FOR PRIESTS

Name _____ Date _____

After discussing the previous year's ministry with your reviewer using one of the forms in *Resources for Performance Management with Parish Personnel* or another format of your choice, summarize the key conclusions of the review discussion. Note major accomplishments and recommendations. Sign this form and obtain your reviewer's signature. Keep a copy for your personal records and put the original in the local personnel file. Prepare a Ministry plan for the coming year.

Priest's Signature _____ Date _____

Reviewer's Signature _____ Date _____

Reviewer Copy

ANNUAL REVIEW OF MINISTRY FOR PRIESTS

Name of Priest _____ Title _____

Name of Reviewer _____ Date _____

- ▶ With this form you should have received a copy of the role description and yearly objectives/goals of the priest whom you are reviewing. Using these materials, reflect on the following questions in preparation for a review meeting.
- ▶ During the meeting discuss your observations and determine future objectives.
- ▶ Record conclusions from the discussion and goals for the coming year on the **Summary: Annual Review for Priests** form (preceding).

1. How has Father fulfilled his responsibilities as articulated in the role description and objectives?
Note specific examples.

2. How has Father enriched himself spiritually, professionally and personally in the past year?

3. How well do his talents, gifts, and skills match the needs of this parish/agency/ organization?
Be specific.

4. How does he employ planning skills to:
Articulate the vision?

Set long and short range goals?

Implement the goals?

Evaluate?

5. How does he relate to other members of the staff and to parishioners/constituency? How does he collaborate and communicate with others?

6. How has he demonstrated:
Accountability?

Responsibility?

Dependability?

Flexibility?

7. What have been his major accomplishments this past year?

8. How could he enhance or improve his ability to minister?

9. What assistance/support/resources would strengthen this ministry?

Priest Copy

ANNUAL REVIEW OF MINISTRY FOR PRIESTS

Name of Priest _____ Title _____

Name of Reviewer _____ Date _____

- ▶ Give the reviewer a copy of this form and a copy of your role description and yearly goals/objectives to the person(s) whom you have selected as a reviewer(s).
- ▶ Reflect on the following questions in preparation for the review meeting.
- ▶ During the meeting discuss your observations and formulate future goals.
- ▶ Record conclusions and goals for the coming year on the **Summary: Annual Review for Priests** form (preceding).

1. How have I fulfilled my responsibilities as articulated in my role description and objectives? (Refer to your **role description and yearly objectives/goals** established at the beginning of the review year. Note specific examples.)

2. How have I enriched myself spiritually, professionally and personally in the past year?

3. How well do my talents, gifts, and skills match the needs of this parish/agency/ organization? Be specific.

4. How well do I employ planning skills to:
Articulate the vision?

Set long and short range goals?

Implement the goals?

Evaluate?

5. How do I relate to other members of the staff and to parishioners/constituency? How do I collaborate and communicate with others?

6. How have I demonstrated:
Accountability?

Responsibility?

Dependability?

Flexibility?

7. What have been my major accomplishments this past year?

8. How could I enhance or improve my ability to minister?

10. What assistance/support/resources would strengthen this ministry?

REVIEW OF MINISTRY FOR PRIESTS

Name _____ Date _____

Place of Ministry (Parish, Agency, etc. .

Reviewer _____ Position _____

REVIEW OF KEY RESPONSIBILITIES

In each section below write a key responsibility or an objective/goal from the past year. (Make additional copies of page 2 if necessary). Add your self-assessment of how the responsibility was fulfilled indicating what was accomplished, as well as desired improvements. Ratings are optional. See page 85 for additional information on rating.

| | |
|-------------------------|-------------------------|
| a. Responsibility/Goal: | d. Rating: |
| b. Self Assessment: | c. Reviewer Assessment: |

| | |
|-------------------------|-------------------------|
| a. Responsibility/Goal: | d. Rating: |
| b. Self Assessment: | c. Reviewer Assessment: |

ANNUAL REVIEW OF MINISTRY FOR PRIESTS: ALTERNATE FORM B

(Please duplicate this page if necessary.)

| | | |
|-------------------------|-------------------------|------------|
| a. Responsibility/Goal: | | d. Rating: |
| b. Self Assessment: | c. Reviewer Assessment: | |

| | | |
|-------------------------|-------------------------|------------|
| a. Responsibility/Goal: | | d. Rating: |
| b. Self Assessment: | c. Reviewer Assessment: | |

| | | |
|-------------------------|-------------------------|------------|
| a. Responsibility/Goal: | | d. Rating: |
| b. Self Assessment: | c. Reviewer Assessment: | |

ASSESSMENT OF KEY COMPETENCIES AND SKILLS

Indicate your self-assessment of the following skills and competencies.

| SKILL/ COMPETENCY | SELF ASSESSMENT | | RATING |
|--|-----------------|--|--------|
| 1. <u>Presiding</u> Presides at liturgy with reverence, dignity and prayerfulness in a manner which is sensitive to the people and which encourages participation. | | | |
| 2. <u>Preaching</u> Preaches the Gospel message in a way that is consistent with a sound understanding of Scripture and which addresses the life experience of the listeners. | | | |
| 3. <u>Knowledge</u> Demonstrates an in-depth grasp of Church teaching, biblical and pastoral theology and a working knowledge of Canon Law and Church history. | | | |
| 4. <u>Communication</u> Demonstrates an ability to speak and write clearly, to teach effectively, to listen actively and to communicate essential information effectively. | | | |
| 5. <u>Relating</u> Relates to others in a professional, pastoral and collaborative manner. | | | |
| 6. <u>Leadership</u> Demonstrates leadership and management skills of planning, administration and coordination of personnel. | | | |
| 7. <u>Mission</u> Promotes the vision and mission of the parish/ agency/ organization. | | | |
| 7. <u>Development</u> Participates in an ongoing process of spiritual, personal and ministerial development. | | | |

REVIEW OF PROFESSIONAL/MINISTERIAL DEVELOPMENT GOAL

- Note your professional/ministerial development goal from the previous year. Write your self-assessment.

| | | |
|-----------------------------------|-------------------------|------------|
| a. Professional Development Goal: | | d. Rating: |
| b. Self Assessment: | c. Reviewer Assessment: | |

Note any additional comments.

Self:

Reviewer:

- Copy this form for your reviewer(s) to add his/her/their assessment(s).
- During the review meeting, discuss the assessments and determine future objectives. (If desired, determine a rating according to the following scale: (5) Far exceeds expectations; (4) Exceeds expectations; (3) Meets expectations; (2) Needs improvement; (1) Does not meet expectations.)
- After discussing the content of this form with your reviewer(s), summarize the key conclusions and future goals and objectives on the **Annual Review for Priests Summary** form (preceding section).

ANNUAL REVIEW OF PRIESTLY MINISTRY
PERSONAL REFLECTION

The following form is supplemental to Alternate A or B. After reflecting and noting significant changes or developments regarding the topics below, you may wish to discuss your reflections with your spiritual director, a close friend, or some other person who can offer additional insight.

1. Continuing Education and Development

(formal/informal education, professional reading, enrichment through the arts: novels, poetry, music, theater, art galleries, museums, etc., hobbies)

2. Relationships

Family

(major family events and their impact on your life)

Other Priests

(changes in your relationships with other priests)

Other Relationships

(changes in your relationships with other people)

3. Spiritual Development

(significant events in your spiritual journey in the past year)

4. **Health**

(significant changes in your health or in how you care for yourself; time for vacation, days off, recreation)

5. **Ministry Assignment**

(significant changes in how you experience your current ministry assignment and its impact on your life)

(changes in other ministries in which you are or have been engaged)

6. **Living Situation**

(changes in your lifestyle and/or living situation; impact of the changes)

7. **Personal Goal Setting**

(progress in the personal goals/resolutions)

8. **Adjusted/New Resolutions/Goals**

(adjustments in these goals in light of progress and of significant changes noted above)