

Personal Evaluation Guide

Items listed on the Personal Evaluation Guide are to help the supervisor determine those factors, which influenced the deputy's results either positively or negatively during the review period. While use of this tool is optional, supervisors will find it particularly valuable as an aid to completing Part IV of the Performance Evaluation Summary. Completion of the Personal Evaluation Guide Independently by the principal and the deputy prior to the evaluation discussion should provide a basis for meaningful communication between them.

Performance Evaluation Summary

1. Analysis of Job Performance

Primary consideration when reviewing performance (at least annually) should focus on the information called for in Section I of the report: results achieved. Part A provides space for an abbreviated listing of principal accountabilities and on-going responsibilities and documentation of results achieved for the items listed. Similarly, Part B is based on the specific objectives previously agreed to for this review period. The level of performance (commendable, unsatisfactory, etc.) represented by the achieved results for each item listed is recorded (✓) in the columns on the right. Previously agreed to standards for each performance level should eliminate evaluation surprises.

2. Additional Contributions

This section provides an opportunity for the supervisor to record performance "extras" of the employee, unplanned and unexpected accomplishments, which represented significant added value to the unit, division or company.

3. Overall Performance

Before making a summary judgment of the employee's overall performance, the supervisor needs to consider the following important questions:

- What was the level of difficulty experienced in attaining these results? (Considering external circumstances, uniqueness of assignments, resources available, competing priorities, etc)
- What was the individual's direct contribution to the results?
- How much assistance was required from me? Others?
- What impact did the achievement have on other employees' performance?
- To what extent did the achieved results contribute to unit and company objectives?

After determining whether the value of the results achieved was enhanced, diminished or unchanged by the above considerations, the Overall Performance rating should be checked in Section III.

4. Personal Development

Record both the strengths and areas for needed growth that were apparent during the review period. The Personal Evaluation Guide can be very useful in arriving at conclusions for this section. Again, the deputy's own evaluation should be part of this discussion and his/her input to the action plan in particular, is essential for gaining commitment.

5. Other Comments

This section of the Performance Evaluation Summary might be used for any of the following:

- a. Remarks about performance during the review period which are not reflected in other parts of this Summary and which the deputy would like "on the record."
- b. Strategies agreed to regarding how principal-deputy relationships can be strengthened during the next period.
- c. Preliminary thoughts on business and managing objectives to be developed for the next period.
- d. Targeted dates for future discussions on objective setting, progress reviews, career planning, etc.

1. Personal Evaluation Guide

Employee Name _____ Date _____ Review Period From _____ to _____	Exceeds Requirements	Meets Requirements (Fully Satisfactory)	Requires Improvement
A. Job Administration/Management			
1. Setting realistic goals/objectives			
2. Developing practical workable plans			
3. Planning work detail			
4. Originating new or improved concepts, methods, techniques			
5. Awareness and understanding of organizational structure			
6. Utilizing personnel, including lay workers, effectively (organization, delegation)			
7. Open and appropriate sharing of information			
8. Keeping other church staff informed			
9. Exercising economy in use of available resources			
10. Meeting deadlines and commitments			
11. Anticipating and taking appropriate action			
12. Analyzing problems and developing logical conclusions			
B. Communication			
1. Effectiveness or oral expression			
a. Informal (visitation, congregational relationships)			
- sensitive and appropriate			
- succinct and direct			
-timely			
b. Formal (Preaching, teaching)			
-expression/presentation			
-logical organization			
-content (meaningful, relevant, appropriate)			
2. Effectiveness of Written expression			
3. Listening and Responding effectively			
C. Personal Qualifications that may affect job performance			
1. Winning confidence and trust			
2. Demonstrated leadership capability			
3. Effective interpersonal relationships			
4. Working as a part of a team			
5. Demonstrated initiative			
6. Effective management of time			
7. Performing under pressure			
8. Adapting to required changes in the work environment			
9. Amount of supervision required			
10. Development of others			
11. Continuing self development			
D. Job Knowledge and Application			
1. Depth of understanding of position			
2. Application of these understanding on the job			
E. Other			

2. Additional Contributions:

3. Overall Performance

Fulfills Expectations

Competent

Is Below Expectations

Unsatisfactory Provisional

Exceeds Expectations

Commendable Outstanding

4. Personal Development

Strengths

Specific Development needs

Action Plan

5. Other Comments

Employee's Signature

Date

Supervisor's Signature

Date

Signatures indicate that the Performance Evaluation Discussion has been held

