

**Sisters of Charity of Nazareth  
Performance Evaluation - Supervisory**

**SUPERVISORY PERFORMANCE EVALUATION**

<b>Employee Name:</b>	<b>Evaluator Name:</b>
<b>Position Title:</b>	<b>Position Title:</b>
<b>Hire Date:</b>	<b>Review Period:</b>
<b>Department:</b>	<b>Review Date:</b>

**GENERAL INSTRUCTIONS**

*This review contains sections that must be completed by the employee and by the evaluator. If paper forms are used, this form should be copied and distributed to the employee to complete at least two weeks prior to the review date. The employee will complete the applicable sections and return the form to the supervisor prior to the scheduled meeting date.*

- The employee should complete the form by checking the boxes under the "Self" section, and making additional comments as necessary.
- The supervisor should complete the form by checking the boxes under the "Evaluator" section and making additional comments as necessary.
- The supervisor and employee will work together to discuss future goals, which will be added to the form before it is returned to the Human Resource Office.

<b>ANNUAL REVIEW FINAL RATING – Average of all ratings on the GENERALCOMPETENCIES section.</b>						
	<b>Ratings</b>					<b>Comments</b>
	Below Expectations	Meets Expectations	Exceeds Expectations			
<b>Overall Performance and Effectiveness Rating – GENERAL COMPETENCIES.</b>	<b>Overall Rating</b>					
	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	

<b>ANNUAL REVIEW FINAL RATING - Average of all ratings on the CURRENT GOALS section.</b>						
	<b>Ratings</b>					<b>Comments</b>
	Below Expectations	Meets Expectations	Exceeds Expectations			
<b>Overall Performance and Effectiveness Rating – CURRENT GOALS.</b>	<b>Overall Rating</b>					
	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	

**RATING SCALE REFERENCE:**

*To be completed by the Human Resource Office.*

Rating Scale:

- 4.25 – 5.0: Consistently Exceeds Expectations = 3.5%
- 3.0 – 4.24: Occasionally Exceeds Expectations = 3.0%
- 2.0 – 2.99: Consistently Meets Expectations = 2.5%
- >2.0 Below Expectations

**Rating Calculation:**

<b>Average of General Competencies</b>	_____ (A)
<b>x .80</b>	<b>= _____ (B)</b>
<b>Average of Current Goals</b>	_____ (C)
<b>x .20</b>	<b>= _____ (D)</b>
<b>OVERALL RATING: (B+D)</b>	<b>= _____ (E)</b>

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**SECTION A: TO BE COMPLETED BY EVALUATOR and EMPLOYEE**

<b>GENERAL COMPETENCIES – complete this section for all employees</b>						
<b>Core Performance Competencies</b>	<b>Rating Scale</b>					<b>Comments (required for 1 or 5 ratings)</b>
	Below Expectations	Meets Expectations	Exceeds Expectations			
<b>JOB KNOWLEDGE</b> <i>Consider: degree to which the employee demonstrates the expected level of job knowledge and/or skills to perform the job; proper use of established information, materials, equipment and techniques for the position; development of job knowledge.</i>	<b>Self</b>					
	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	
	<b>Evaluator</b>					
	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	
<b>QUALITY OF WORK</b> <i>Consider: employee's completion of assignments to established quality standards; accuracy, neatness, thoroughness of work; compliance with established work, health and safety rules.</i>	<b>Self</b>					
	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	
	<b>Evaluator</b>					
	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	
<b>QUANTITY OF WORK</b> <i>Consider: employee's demonstrated ability to manage assigned workload; employee's effectiveness in establishing and managing priorities effectively; employee's consistency, productivity and timeliness in completion of work</i>	<b>Self</b>					
	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	
	<b>Evaluator</b>					
	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	
<b>ADAPTIBILITY</b> <i>Consider: ease with which the employee adjusts to change in duties, procedures, supervision or work environment; response to new ideas, approaches to work and suggestions for work improvement; learning and/or application of new information.</i>	<b>Self</b>					
	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	
	<b>Evaluator</b>					
	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	
<b>INITIATIVE &amp; PROBLEM SOLVING</b> <i>Consider: degree to which the employee seeks and assumes greater responsibility; recognition of problems, and effectiveness in taking action with solutions; generating innovative ideas, approaches and solutions.</i>	<b>Self</b>					
	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	
	<b>Evaluator</b>					
	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	
<b>COMMUNICATION &amp; INTERPERSONAL SKILLS</b> <i>Consider: job related professionalism and effectiveness in interacting with co-workers and others; demonstrated ability to express ideas clearly both orally and in writing; demonstrates respectful and courteous treatment of others.</i>	<b>Self</b>					
	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	
	<b>Evaluator</b>					
	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	
<b>ETHICAL CONDUCT</b> <i>Consider: whether employee follows code of ethics and other applicable business ethics; handling of sensitive and confidential information; demonstration of honesty and trustworthiness in actions.</i>	<b>Self</b>					
	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	
	<b>Evaluator</b>					
	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	

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**SUPERVISOR/MANAGER COMPETENCIES** – complete this section only for supervisors who are responsible for supervising other staff members.

Core Performance Competencies	Rating Scale					Comments (required for 1 or 5 ratings)
	Below Expectations		Meets Expectations		Exceeds Expectations	
<b>LEADERSHIP</b> <i>Consider: effectiveness in gaining respect and cooperation of departmental employees; effectiveness in maintaining a cohesive work unit; appropriate delegation of authority and responsibilities; demonstration of effective planning of department functions.</i>	<b>Self</b>					
	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	
	<b>Evaluator</b>					
	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	
<b>EMPLOYEE DEVELOPMENT</b> <i>Consider: ability to provide feedback to others; ability to coach for improved performance; evaluates staff effectively; provides meaningful orientation and ongoing development opportunities.</i>	<b>Self</b>					
	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	
	<b>Evaluator</b>					
	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	
<b>RESOURCE MANAGEMENT</b> <i>Consider: effective use of staff, budget and materials; budgets appropriately; controls expenditures and contributes cost reduction ideas; makes decisions in the best interest of the SCN Congregation; seeks improvements in efficiency.</i>	<b>Self</b>					
	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	
	<b>Evaluator</b>					
	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	

**SECTION B: JOB SPECIFIC DUTIES** – complete this section for all employees using the job description for the position. List and rate 3-4 of the Essential Duties and Responsibilities from the job description.

Duties	Rating Scale					Comments (required for 1 or 5 ratings)
	Below Expectations		Meets Expectations		Exceeds Expectations	
	<b>Self</b>					
	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	
	<b>Evaluator</b>					
	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	
	<b>Self</b>					
	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	
	<b>Evaluator</b>					
	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	
	<b>Self</b>					
	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	
	<b>Evaluator</b>					
	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	

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**SECTION C: CURRENT GOALS: To be completed by Supervisor and Employee.**

Goal Type	Goal	Outcomes
Performance Goals		<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 Comments:
		<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 Comments:
		<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 Comments:
Training/ Development Goals		<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 Comments:
		<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 Comments:
		<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 Comments:

**SECTION D: Future Goals – To be completed by Supervisor and Employee**

**Goals should be SMART: Specific, Measureable, Attainable, Realistic, Time-Limited.**

Goal Type	Goal	Comments:
Performance Goals		
Training/ Development Goals		

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**SECTION E: Acknowledgement**

**TO BE COMPLETED BY EVALUATOR and EMPLOYEE BEFORE SUBMITTING FINAL REVIEW TO THE HUMAN RESOURCE OFFICE.**

<b>ANNUAL REVIEW ACKNOWLEDGMENT</b>	
<b>To be completed to indicate that the evaluation has been reviewed with the employee. Signature does not indicate agreement with the ratings.</b>	
Employee Signature	Evaluator Signature
Date	Date

**Note: An employee's signature indicates that the planning or review meeting took place. It does not indicate agreement with the ratings.**

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**EMPLOYEE COMMENTS:**

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**SUPERVISOR/EVALUATOR COMMENTS:**