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**The Roman Catholic Church of the Diocese of Phoenix**  
**Human Resources Policies and Procedures**

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#### Policy 2-7.1.21 Employee Performance Evaluations

Performance evaluations are important from employee development, management and justice perspectives. They must be conducted both openly and honestly. The contents of an annual valuation review should not surprise employees. Discussion about performance should be on going. Problems should be addressed and resolved and not ignored in inflated appraisals of performance. Inaccurate performance appraisals can undermine legitimate attempts to discipline an employee at a later date.

Expectations outlined in a performance evaluation should be based on the essential functions of the job listed in the job description.

The performance evaluation process should give employees the opportunity to comment on the evaluation and/or appeal its results.

#### Procedures:

##### Introductory Period Reviews

During the introductory period, the supervisor and the employee should continually review the expectations of the job and determine how well the employee is meeting those expectations. This aids in the proper training of the employee and helps ensure their professional development and success. It also helps establish clear lines of communication and reduces misunderstandings.

At the end of an employee's introductory period, a formal review should be given. During the introductory review meeting, the supervisor and employee should discuss and document the expectations upon which the employee will be measured over the next review period.

##### Annual Performance Evaluations

Formal performance evaluations are done annually. It is recommended that the employee and the supervisor have informal meetings regularly during the review period to discuss progress on meeting the expectations outlined. This helps ensure there are "no surprises" during the formal review meeting and keeps the lines of communication open between the supervisor and the employee.

A. Self-Appraisals. When the supervisor schedules the meeting date with the employee, the employee should be given a self-appraisal form and a copy of their current job description. The employee should complete the self-appraisal and review the job description for accuracy and return them to the supervisor before the scheduled meeting. The object of the self-appraisal is to involve the employee in the

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process and provide an opportunity for employee input. The supervisor then considers the employee's input when preparing the formal performance evaluation.

- B. **The Performance Evaluation Meeting.** During the formal review meeting, the supervisor should have a completed review form and should be prepared to discuss the employee's progress during the review period. The employee will be encouraged to give input during the meeting. At this meeting, expectations should be developed for the next review period. The employee will be asked to sign the review and add additional comments if desired.
  
- C. **Salary and Wage Increases.** The Diocese of Phoenix believes that, when possible, salary and wage increases should be linked to performance appraisals. Each supervisor shall recommend, or not recommend, pay increases depending on the employee's performance. The employee should have a current performance appraisal report on file prior to the effective date of any recommended salary increase.
  
- D. **Recordkeeping.** The employee should be given a copy of the review for their use, the supervisor should keep a copy, and the signed original will be forwarded to the Human Resources Office for entry into the HR system for processing and filing in the employee's human resources file.

*Note: Formal employee performance evaluations of school staff, teachers and principals will be conducted in accordance with the Handbook of Policies and Regulations for Catholic Schools.*

See Forms: [Introductory Period Performance Appraisal](#); [Performance Appraisal Form](#)

Approved by Bishop Thomas J. Olmsted on October 27, 2006