

CASA Program

PERFORMANCE APPRAISAL FORM (Supervisory)

Name _____

Appraisal Period _____
Beginning Date Ending Date

Title _____

Date Original Objectives Set _____

Date of Hire _____

Date of Appraisal Discussion _____

Instructions for Completing the Performance Appraisal Form:

- At the beginning of the appraisal period, CASA's executive committee and executive director jointly define specific goals and objectives (or key job responsibilities) and performance measurements to be achieved during the next 12 months.
 - At the end of the appraisal period, the executive committee will measure the individual's performance against the defined goals and objectives (or key responsibilities) and assign one of the ratings below:
1. **Clearly Outstanding**
Results produced were exceptional and substantially exceeded goals. For measured goals, by 110-120%.
 2. **Frequently Exceeds Expectations**
Performance noticeably exceeded anticipated results on most occasions. For measured goals, by 100-110%.
 3. **Consistently Meets Expectations**
Results produced met anticipated goals and objectives. Work was timely, thorough and made a tangible contribution. For measured goals, by 90-100%.
 4. **Somewhat Less Than Satisfactory**
Results fell short of meeting expectations due to inadequate / insufficient planning, effort or ability, or training. For measured goals, less than 90% but greater than 75%.
 5. **Unacceptable**
Results fell seriously short of expectations due to inadequate performance. For measured goals, less than 75%.
- After rating Part I (Goals and Objectives), the executive committee should then complete Part II (Performance Competencies), citing reasons for the ratings in each area and determine an Overall Rating (Part III) for the individual.
 - During the annual review, the executive committee and executive director will formulate a joint development plan that addresses the executive director's career interests, agency targets, as well as. any areas where improvement is needed. (Part IV).
 - Both the executive committee and executive director should sign the form after their discussion and make any additional comments in the area provided. Both parties should keep a copy and return the completed original to CASA files.

1. Executive Director's GOALS AND RESPONSIBILITIES	Prior the start of the new appraisal period, the exec. director and exec. committee will list and number the mutually agreed upon goals. At the end of the appraisal period, the exec. director will describe the results achieved as specifically as possible, then, self-rate the goal. The exec. committee will review the goals and then rate the performance of each independently, ultimately providing feedback during the annual appraisal meeting. 50% of the annual review rating is goal-driven.		
Goals for the period _____ to _____.	Results Achieved and Comments. If not achieved, please provide an explanation of why the goal was not reached. It may become part of next year's performance goals.	Rating (1-5)	

Goals Added or Revised During Review Period	Results Achieved and Comments	Rating (1-5)
Comments:	Overall rating for measured goals: Compute the average score and assign here. Weight for total score on evaluation = 50%.	

II. PERFORMANCE COMPETENCIES

Carefully evaluate the executive director's work performance in relation to current job requirements, goals and expectations. Use the descriptions for each rating as a guide and select the appropriate level of performance. As appropriate, provide examples to support the rating.

1. Job Knowledge/Skill

Understanding and knowledge of CASA policies, procedures and practices relevant to position. Demonstration of procedural expertise and skill required.

1

☐

Far exceeds knowledge required for job and is always thoroughly informed. Demonstrates excellent program operations skills. Expertise is widely acknowledged and sought after. Instructs peers/volunteers in area of expertise to advance their learning.

2

☐

Exceeds required level of knowledge in many instances. Demonstrates skill that is often above what is expected in job.

3

☐

Demonstrates knowledge and skills consistent with level of training and years of experience. Executes duties as instructed by the exec. committee.

4

☐

Has fair knowledge of job duties and procedures. Requires some improvement in skill level. Regularly requires assistance and instruction. (Possibly new to job and in learning stage).

5

☐

Lacks knowledge of job. Does not meet skill requirements.

Explanation: _____

2. Internal Relations

Degree to which executive director works effectively and cooperatively with volunteers, board, staff and others in achieving CASA goals in areas of written and verbal communications and teamwork in a timely manner. Works to break down barriers that stand in the way of agency and/or fellow team member program efforts for success. Actively listens, receiving input from members (CASA kids), volunteers, board members, staff and others. Keeps executive committee informed of important issues.

1

☐

Shows exceptional level of cooperation in working with others. Excellent and timely communicator. Always takes initiative in responding to CASA needs while providing high level of teamwork.

2

☐

Often takes initiative in responding to CASA needs and offering high level of cooperation. Is a strong team player. Communicates effectively.

3

☐

Cooperates fully with others and is responsive to CASA needs. Is a good team player. Maintains open lines of communication.

4

☐

Needs some improvement in level of cooperation and responsiveness. Takes little initiative in teamwork. Is late in responding to requests.

5

☐

Shows little cooperation or teamwork. Not responsive to CASA needs.

Explanation: _____

3. Public/Community Relations

The ability to develop, nurture and maintain agency relationships and services. Educates the community on CASA services.

1

☐

Demonstrates superior skill in every aspect of agency public relations and services. Performance generates good will and significantly enhances the agency's image in the community.

2

☐

Demonstrates visible skill in agency relations and services. Puts forth excellent effort and enthusiasm toward enhancing agency relations **and** profitability. Exceeds normal expectations for developing agency relations.

3

☐

Has thorough knowledge of products and services. Effectively educates and counsels agency volunteers, staff and interested media. Participates actively in promoting good member relations.

4

☐

Needs to strengthen agency PR skills and effective communication of agency services. May be new to position. Requires additional training and/or effort put forth in this area.

5

☐

Shows marginal skill in agency relations. Fails to consider effects of his/her actions. Intercession at a higher level frequently needed to resolve conflicts and problems that result.

Explanation: _____

4. Quality of Work

Degree of accuracy, neatness, thoroughness, and/consistency in work produced. Measure of excellence in the development and implementation of delivery systems, program activities and resources. Degree of self-management; excellent time management skills. Maintains control on all current projects/responsibilities and ensures proper follow up.

1

☐

Perform work of highest level. Work is very complete and almost errorless. Demonstrates creativity in managing time and control over multiple projects and responsibilities.

2

☐

Work exceeds agency standards with minimum errors. Shows complete attention to detail. Usually excels in managing own time and maintaining project control and priorities.

3

☐

Fully meets agency's quality standards with reasonable errors. Works effectively with minimal supervision. Ensures proper control and follow-up.

4

☐

Occasionally work does not meet standards. Some rework is required. Rate of errors needs some improvement. Needs to work on time management.

5

☐

Work does not meet agency standards. Error rates are unacceptable. Does not complete work on time. Fails to follow up.

Explanation: _____

5. Values and Integrity The demonstration of integrity and ethical behavior in work and actions. Assurance of compliance with governmental laws and regulations. Keeping the purpose (mission) and values of the organization paramount in all program activities, communications and collaborations. Exec. Director's being forthright, fair and honest about decisions and program needs; provides honest feedback to the organization.

1

☐

Has superior verbal and writing abilities. Demonstrates exceptional two way communication skills. Keeps everyone well informed at all times.

2

☐

Demonstrates very good communication skills. Is an active listener. Keeps executive committee and others well informed on a timely basis.

3

☐

Fully meets required level of communication in verbal and written form. Is an active listener and keeps executive committee well informed in most cases.

4

☐

Occasionally fails to communicate appropriately with all team members including supervisor; some improvement is needed.

5

☐

Demonstrates poor communication skills that negatively impact the team. Does not listen to views of others. Fails to keep executive committee properly informed.

Explanation: _____

6. Initiative & Valuing Essential Resources The ability to offer and implement new and creative ideas, approaches, and/or solutions to improve volunteer and member (CASA kids) services and operational efficiency, while valuing essential resources.

1

☐

Continuously strives to find opportunities to develop new and innovative programs and services or expand them as needed. Looks for ways to achieve revenue opportunities, cost savings and or enhance member and volunteer experiences.

2

☐

Developed several very good ideas during past review period which impacted program budget viability and/or volunteer and member services. Maintains effective use of assets.

3

☐

Routinely offers good suggestions to improve productivity and/or volunteer services. Effectively uses assets and resources to support goals and objectives.

4

☐

Made one or two good suggestions for financial /program improvements during the past review period. Effective use of resources.

5

☐

Did not show initiative to improve program operations and/or volunteer services. Flawed budgetary planning.

Explanation: _____

7. Leadership & Staff Management

The ability to obtain outcomes and results. Provide guidance, clear direction (vision), motivation to the team. Create an environment for a successful team. Models commitment and develops positive attitudes through one's presence. Effective management of HR functions including; hiring, training, motivating and providing feedback to staff and board.

1

☐

Provides subordinates with exceptional guidance, direction and motivation. Leads effectively in a fast paced, changing environment. Effectively manages HR functions. Excellent coach and inspires/leads by example.

2

☐

Consistently provides guidance and clear direction to subordinates and gains compliance quickly. Inspires teamwork. Usually excels in maintaining the HR functions of hiring, training, motivating and providing feedback to staff.

3

☐

Provides staff with necessary direction to accomplish most objectives. Makes a good effort to motivate and promote teamwork. Trains as needed. Effectively manages the HR function.

4

☐

Provides staff with limited guidance and direction. Gives feedback selectively. Some performance issues are ignored. Needs further training in HR function skills.

5

☐

Does not provide consistent clear direction and guidance to team resulting in failed objectives and or missed deadlines. Did not delegate appropriately. Showed favoritism. Provided little or no feedback to staff. Inadequate HR function skills.

Explanation: _____

8. Decision-Making and Integrity

The ability to be a strategic thinker, make decisions and solve problems in a timely manner. Can be flexible and change strategy as the environment dictates. Be knowledgeable of opportunities and trends in the CASA program. Projects an assurance in his/her own abilities.

1

☐

Exhibits superior ability to analyze situations and exercise good judgment. Possesses in-depth knowledge of trends. Is able to identify opportunities to drive CASA programs forward. Decisions are always sound and timely.

2

☐

Consistently demonstrates clear thinking, common sense and good judgment. Stays abreast of pertinent regulatory/procedural/pro gram issues. Effectively monitors planning and implementation processes and modifies plans as circumstances dictate.

3

☐

Generally uses good judgment when making decisions. Demonstrates a practical, simple approach to problem solving. Customarily includes the appropriate people in the decision making process. Has basic knowledge of program trends.

4

☐

Is tentative in the decision making process. Does not always collect all the facts necessary to make an appropriate decision. Has limited knowledge of the program. Needs additional training.

5

☐

Often did not reason logically. Repeatedly ignored and misinterpreted facts, resulting in the selection of wrong alternatives. Failed to include others in decision making process. Lacks basic knowledge of program trends.

Explanation: _____

III. OVERALL RATING

Considering all factors, check the definition which best describes this executive director's overall performance during the past period.

☐

Clearly
Outstanding

☐

Frequently
Exceeds
Expectations

☐

Consistently
Meets
Expectations

☐

Less Than
Satisfactory

☐

Unacceptable

IV. DEVELOPMENT PLANS

List mutually agreed upon steps to improve present performance or prepare for future assignments.	Draft Goal areas for next appraisal period.
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V. COMMENTS

Exec. Committee Comments:

Executive director's Comments :

VI. SIGNATURES

Executive director (Acknowledging Receipt of this Appraisal)_____ Date_____

Evaluator(s)_____

NOTE: EXECUTIVE DIRECTOR MUST BE GIVEN COPY OF THIS APPRAISAL. Return signed copy to CASA files.