Overview

Performance Evaluation
Agenda for today

Why annual performance evaluation?
What is part of the evaluation?
How do quarterly check-ins and annual evaluations mesh?
What is the process and timetable?
INTRODUCTIONS

your NAME
where you WORK
Why is evaluation important?

• What am I doing well?
• How can I improve?
• What are the
  • skills,
  • knowledge, and
  • behaviors I need to be successful?
• What are my major accomplishments and milestones
• What are some goals/where am I going?
• Two way conversation
Are you too busy to improve?

No thanks!

We are too busy

STOP
Listen
Learn
What am I evaluated on?

1. Job performance
   • Skills
   • Knowledge

2. Work-related behavior

Competencies
What am I evaluated on?

1. Job performance includes:
   - Position Description
   - Goals from last year
   - Additional endeavors? Initiatives?
What am I evaluated on?

- Observable behaviors
- Teamwork
- Communication – Interpersonal Skills

2 Work-related behavior
Process
Annual Evaluation – March 1 – February 29

due March 31
Complementary Tools

Quarterly Check-in  Annual Evaluation
## Complementary Tools

### Quarterly Check-in

- Record of conversation
  - Free form
  - Quick and agile
- Short-term
  - Accomplishments
  - Goals

### Annual Evaluation

- Evaluative
  - Standardized
    - Ratings
    - Categories
    - Unambiguous
  - Comprehensive
- Long-term
  - Accomplishments
  - Goals
Complementary Tools

**Quarterly Check-in**
- Self assessment
  - voluntary
- Informal
- Ends with supervisor feedback

**Annual Evaluation**
- Self assessment
  - voluntary
- Signatures
  - Employee
  - Supervisor
  - Second level supervisor
- Employee response
Complementary Tools

**Quarterly Check-in**
- Informal record of conversations based on work over one quarter
- Mechanism for recording accomplishments on regular basis

**Annual Evaluation**
- Formal evaluative and documented accomplishments based on job description
- Mechanism for merit
  - Equitable
  - Transparent
  - Standardized
0) Review content from quarterlies

1) Self assessment
   To supervisor

2) Supervisor evaluation
   2nd level supervisor review

3) Share with employee
   Meet with employee

4) Finalize evaluation
   Submit to employee
   Submit to Libraries HR by March 31st

Performance Evaluation Steps
Two Evaluation Formats

The Form –
For All USPS and hourly TEAMS employees

The Cover Sheet & Letter
For TEAMS exempt employees
Two Evaluation Formats

The Form –
For All USPS and hourly TEAMS employees

BOTH

- Available as writable Word document
- 2nd level supervisor signature required
- Strongly encourage employee self assessment
- Top section information provided by HR
- Include a statement about conflict of interest
- Require overall rating

The Cover Sheet & Letter -
For TEAMS exempt employees
Overall Ratings

- Exceeds
- Above Average
- Achieves
- Minimally Achieves
- Below Performance Standards

Contact Libraries HR
All USPS and TEAMS non-exempt

TEAMS Non-Exempt, USPS Non-Exempt and USPS Exempt Performance Appraisal Form

Name: 
Title: 
Position #: 

Appraisal Type: Check one □ Annual □ Probationary
Appraisal Period:

UF ID:
FTE:
Job Code:

PART A: Employee Self Assessment
To be completed by employee and returned to supervisor prior to appraisal meeting.

Work Performance (Briefly list your main accomplishments during the appraisal period.)

Reliability/Attendance (Describe your reliability in performing your essential job duties during the appraisal period.)

Customer Service

Initiative/Productivity (List important accomplishments during the appraisal period.)

Teamwork & Interpersonal Skills

Goals for the next appraisal year

Annual appraisals must be issued to, signed, and dated by employees no later than March 31. Forms should be emailed or delivered to Libraries Human Resources Office, Attn: Tina Marie Litchfield, litchfield@library.ufl.edu, PO Box 117024, Campus. Phone: (352) 273-2602.
Performance Categories

- Work Performance
- Customer Service
- Attendance and Reliability
- Initiative and Productivity
- Teamwork and Interpersonal Skills
What types of things might you evaluate or be evaluated on in this category?

- The skills
- The knowledge
- The abilities
- How the job is performed
- The nuts and bolts of the job
Attendance and Reliability

What types of things might you evaluate or be evaluated on in this category?

• Attendance
• Task completion
• Follow through
• Accuracy in work product
Customer Service

What types of things might you evaluate or be evaluated on in this category?

- Assistance
- Presentation/Demeanor
- Communication/Respect
- Service
- Phone manner
- Electronic communication
What types of things might you evaluate or be evaluated on in this category?

- Motivation
- Organizational skills
- Vision
- Work volume
- Work accuracy
- Effectiveness
Teamwork and Interpersonal Skills

What types of things might you evaluate or be evaluated on in this category?

- Cooperation
- Collaboration
- Flexibility
- Consensus
- Supportive
- Communication
- Effectiveness

You cannot be effective without teamwork and interpersonal skills
Performance Category Ratings

Rate Each Performance Category

Exceeds: 5  
Above Average: 4  
Achieves: 3

Minimally Achieves: 2  
Below: 1
Overall Ratings

- **Exceeds**: 25-24
- **Above Average**: 23-20
- **Achieves**: 19-15
- **Minimally Achieves**: 14-10
- **Below**: 9-5

Contact Libraries HR
The Cover Sheet and Letter

TEAMS exempt
TEAMS Exempt employees should be evaluated on their **Leadership** and **Supervisory Skills** (if applicable) as well as the 5 performance categories and other appropriate areas of responsibility.
Writing the letter

1. Use Performance Categories ++
2. Use Position Description
3. Don’t forget past and future Goals

Give an Overall Rating on Cover Sheet
review of last year is important but well written GOALS help predict future success

GOALS

‘a goal without a plan is just a wish’
Based on your job - position description

Outline objectives and specific activities

Discussed
Types of Goals

• Performance Goals

What you are working to accomplish

• Development Goals

Areas you want to develop in order to grow in your job
Performance Goals - Example

Design an online training guide for student assistants.
Increase my effectiveness in using Excel spreadsheets.
Tips for writing goals

• Don’t wait for your supervisor to suggest writing goals. Write 3 – 4 goals.
• Discuss each goal with supervisor
• Understand how they relate to the goals of the department/why they matter
Ask yourself:

• What results will you produce?
• What will be different in your department or the libraries?
• What will you do and when will you do it?
• How will you know you’ve made progress?
## SMART GOALS

<table>
<thead>
<tr>
<th><strong>S</strong> Specific &amp; Strategic</th>
<th>Outline exactly what you hope to accomplish and what the impact will be.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>M</strong> Measurable</td>
<td>There must be some way of measuring and verifying whether the objective has been achieved and to what level.</td>
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<td>Need to have clear time frames attached to them.</td>
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Example 1

Develop 3 new trainings

[that respond to training gaps in the competencies training matrix]

- One training on improving presentation skills, one on emergency procedures and one on customer service

- Trainings delivered in April, August and January
Collaborate with other circulation supervisors to design an online training guide for student assistants

[to improve the time it takes to train them and make it more consistent throughout the Libraries]

- The guide should include links to key documents and other resources.
- And should be available for Fall 2020 incoming student assistants.
# SMART GOALS

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Need to have clear time frames attached to them. |
For Employees
Who’s in charge?

• You may feel powerless but…
  • It’s the receiver who is in charge
    • You decide what you will accept
    • You decide what sense you will make of it
    • You decide whether or not and how you will change

Credit: Sheila Heen, researcher at Harvard Negotiation Project
Five Tips

1. Start the meeting on a positive note
2. Concentrate on Clarity
3. If you need a time-out, take it
4. Ask for specific feedback
5. Enlist a friend to evaluate any criticism
Make sure you come away from your performance evaluation meeting with information you can use.
Forms and Training and Supervisor Checklist on Libraries HR TEAMS & USPS Webpage
Have we missed anything?
Thank You