

A tour of the process and some tips 

Overview

Performance Evaluation



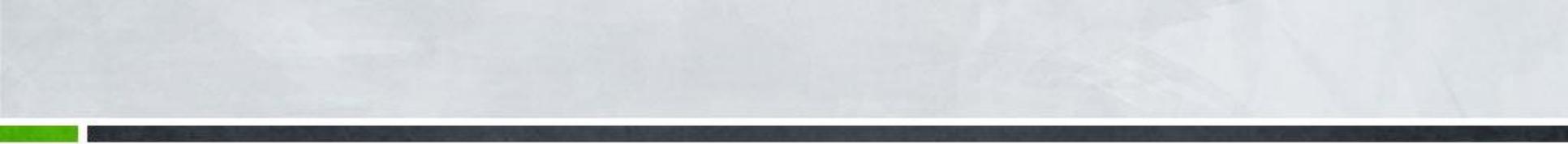
Agenda for today

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?



HELLO

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?



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 28

due March 31



Complementary Tools

Quarterly Check-in

Annual Evaluation

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

Quarterly Check-in

- Self assessment
 - voluntary
- Informal

- Ends with supervisor feedback

Annual Evaluation

- Self assessment
 - voluntary
- Signatures
 - Employee
 - Supervisor
 - Second level supervisor
- Employee response

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

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: []

UF ID: []

Title: []

FTE: []

Position #: []

Job Code: []

Appraisal Type: Check one Annual Probationary

Appraisal Period: []

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; titchfield@uflib.ufl.edu; PO Box 117024; Campus. Phone: (352) 273-2602.

Performance Categories

Work Performance

Attendance
and
Reliability

Customer Service

Initiative
and
Productivity

Teamwork
and
Interpersonal Skills



Work Performance

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

Initiative and Productivity

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

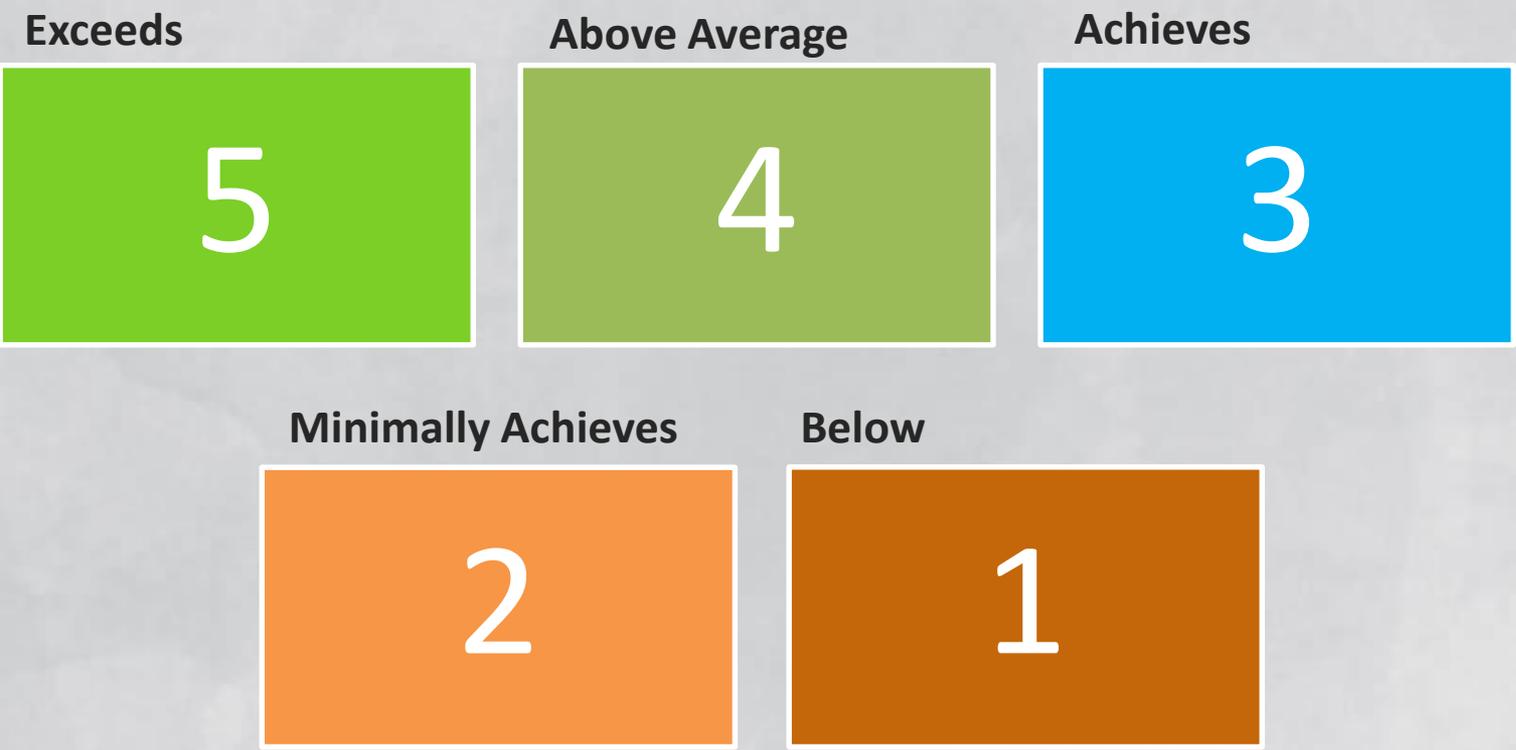
What types of things might you evaluate or be evaluated on in this category?

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



You cannot be effective without teamwork and interpersonal skills

Performance Category Ratings



Rate Each Performance Category

Overall Ratings

Exceeds
25-24

Above Average
23-20

Achieves
19-15

Minimally Achieves
14-10

Below
9-5

**Contact
Libraries HR**

TEAMS exempt

Performance Appraisal form for TEAMS Exempt Employees

Employee's Name: [Click here to enter text.](#)

UF ID: [Click here to enter text.](#)

Job Title: [Click here to enter text.](#)

Appraisal Period: [Click here to enter text.](#)

Department: [Click here to enter text.](#)

Overall Rating: [Choose an item here.](#)

Appraisal Type: Check One Annual Probationary

Prior to completing the appraisal, it is recommended that the employee submit a self-assessment.

Please attach a narrative to this form providing a detailed evaluation of the employee's performance in areas such as productivity, initiative, leadership, attendance, reliability, customer service, teamwork, interpersonal skills, supervisory skills or other appropriate areas of responsibility. Goals should also be set for the next appraisal year.

An overall rating based on the rating categories listed below, must be entered on this form. The overall rating should be consistent with the evaluative comments on the narrative. Please contact Libraries Human Resources Office prior to issuing an overall rating of "Minimally Achieves" or "Below".

- **Exceeds:** *Almost always exceeds performance standards. Consistently produces excellent quality work, is innovative, and demonstrates high level leadership qualities.*
- **Above Average:** *Consistently meets and regularly exceeds performance standards. Able to work independently.*
- **Achieves:** *Generally meets performance standards. Seldom exceeds or falls short of desired results. Able to work independently, but sometimes requires direction.*
- **Minimally Achieves:** *Frequently fails to meet performance standards. Requires frequent instruction and supervision.*
- **Below Performance Standards:** *Fails to meet performance standards.*

Employee's Acknowledgment of Review and Receipt:

By signing below, I acknowledge that my evaluation has been reviewed with me and I have received a copy. I understand that my signature does not necessarily indicate my agreement with the evaluation. Also, I understand that I may submit written comments/rebuttal on any aspect of the performance appraisal, and that a copy of the comments will be provided to my supervisor as well as Human Resource Services for inclusion in my official personnel file. Rebuttals/comments should be submitted to Human Resource Services within ten (10) working days of receipt of appraisal.

If typing my name, I hereby certify that my typed name constitutes my official signature.

_____ Employee's Name	_____ Employee's Signature	_____ Date
_____ Supervisor's Name	_____ Supervisor's Signature	_____ Date
_____ Higher Level Supervisor's Name	_____ Higher Level Supervisor's Signature	_____ Date

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Performance Categories for 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



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’



GOALS

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 a fiscal training for OPS supervisors.



Development Goal - Example

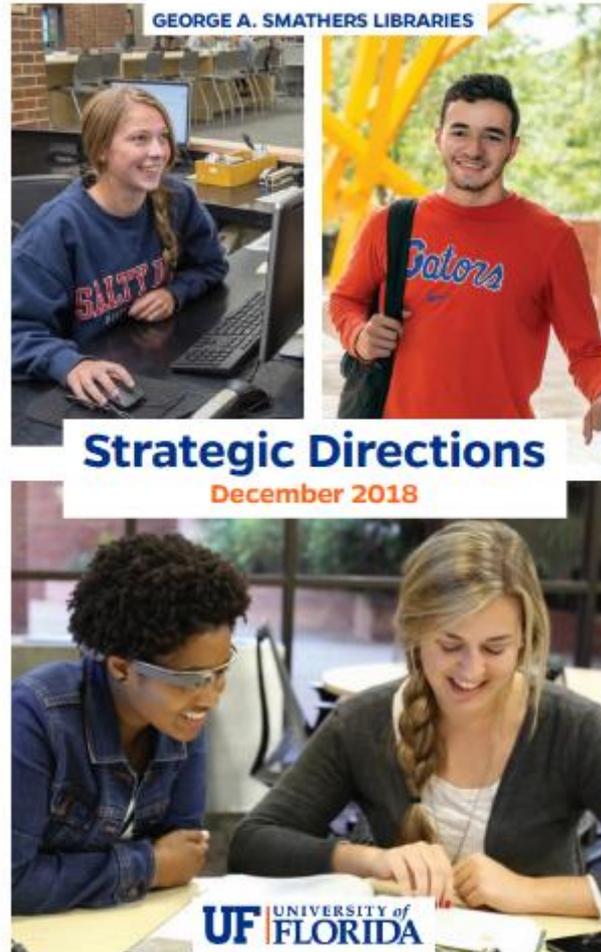
Increase my effectiveness in using Excel spreadsheets.



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

Strategic Directions



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?

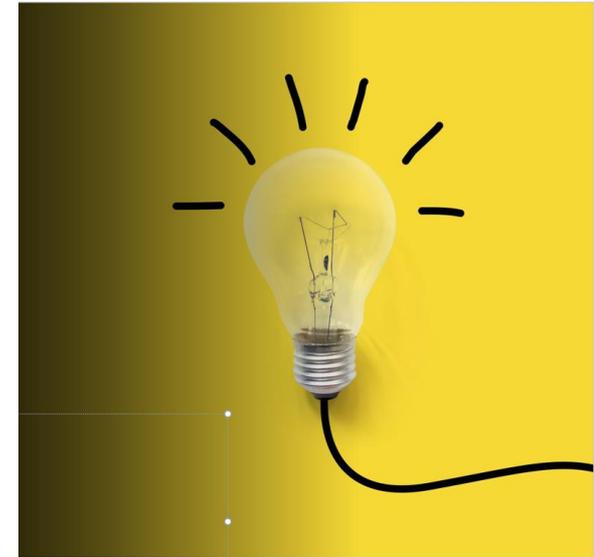
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Action Plans Based on ClimateQUAL and Idea Forums



FOUR Areas for Review and Development

- Communication and Information Sharing
- Leadership Norms
- Employment Practices
- Training and Development



These most closely associate with 4 ClimateQUAL dimensions:

Distributive Justice: the extent to which the rewards (e.g., pay, opportunities to advance, etc.) are adequate given employee effort and work

Interpersonal Justice: the extent to which other people in the workplace, such as supervisors, treat an employee fairly

Informational Justice: whether or not an employee has access to the information they need... transparency—that is, supervisors being honest and open with employees

Climate for Psychological Safety: the degree to which an organization or teams therein encourage employees to freely share opinions with each other and with management... a safe environment for self-expression



- **Leadership Norms Action Plan**

Individual team leaders and supervisors will:

1. review data and consider changes within their span of authority; review plans with next level supervisor; and implement changes to enhance outcomes and experiences
2. engage in training and learning opportunities identified by Library Training & Development

UF | George A. Smathers Libraries

Smathers Libraries Site

Human Resources Home
Prospective Employees
Employment Opportunities
New Employee Guide
Current Employees
ClimateQual
Staff Development & Training
New Staff Photos
Project Management Toolkit
OPS Information
TEAMS & USPS Information
Faculty Information
Payroll Tips
Fun at Smathers
Watercooler E-mail List

Libraries Human Resources

[Access the 2019 Report and Documents](#)

[Access the 2014 Report and Documents](#)

 **ClimateQUAL**
Organizational Climate and Diversity Assessment

BACKGROUND
As an ongoing effort in the strategic planning process, the Libraries



The goal of ClimateQUAL is to allow individuals, units, managers, and other library groups to gain perspective. The goal is for these to make information more digestible and useful.

Shared Documents

<input checked="" type="checkbox"/>	Name	Modified	Modified By
<input type="checkbox"/>	1. ClimateQUAL	November 5, 2020	<input type="checkbox"/> Piazza, Joseph Charles
<input type="checkbox"/>	2. Idea Forums	November 5, 2020	<input type="checkbox"/> Piazza, Joseph Charles
<input type="checkbox"/>	3. Action Plans	November 5, 2020	<input type="checkbox"/> Piazza, Joseph Charles

SMART GOALS

Performance Goals must be:	
S	Specific & Strategic Outline exactly what you hope to accomplish and what the impact will be.
M	Measurable There must be some way of measuring and verifying whether the objective has been achieved and to what level.
A	Attainable Attainable; not so lofty that you can't achieve them and not so simple that you won't be challenged.
R	Relevant The objectives must be relevant to the level at which the individual is at in his/her career, to the priorities and workload of the specific department
T	Timely Need to have clear time frames attached to them.

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

Example 2

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]

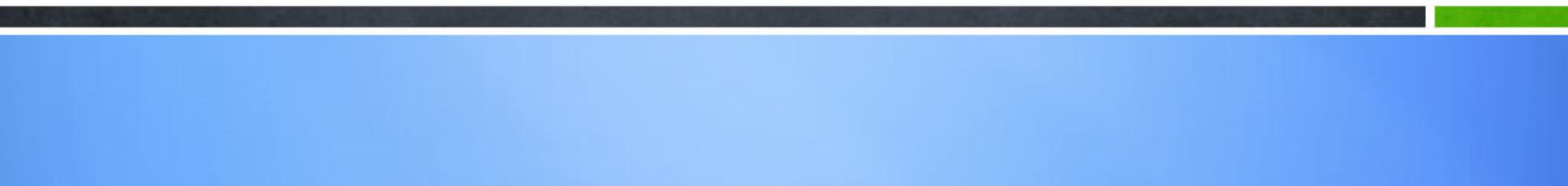
- The guide should include links to key documents and other resources.
- And should be available for Fall 2020 incoming student assistants.

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For Employees

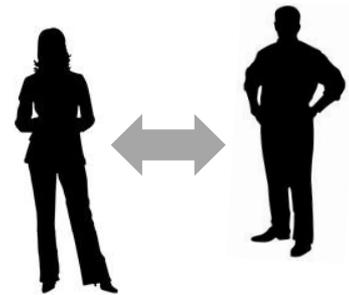


Who's in charge?

- 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

Five Tips

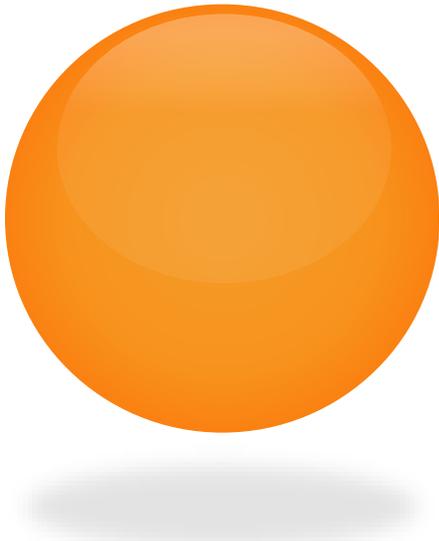
1. Start the meeting on a positive note
2. Concentrate on Clarity
3. If you need a time-out, take it
4. Ask for specific feedback
5. Enlist a friend to evaluate any criticism



Five Tips

Make sure you
come away from your performance
evaluation meeting with information
you can use





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Human Resources Home
Prospective Employees
Employment Opportunities
New Employee Guide
Current Employees
ClimateQual
Staff Development & Training
New Staff Photos
Project Management Toolkit
OPS Information
TEAMS & USPS Information
Faculty Information

Libraries Human Resources



Teams & USPS Resources

	UF Collective Bargaining Agreements (CBA)	Supervisor Checklist for TEAMS and USPS Performance Evaluations <ul style="list-style-type: none">• USPS and TEAMS Nonexempt Performance Evaluation• TEAMS Exempt Performance Evaluation
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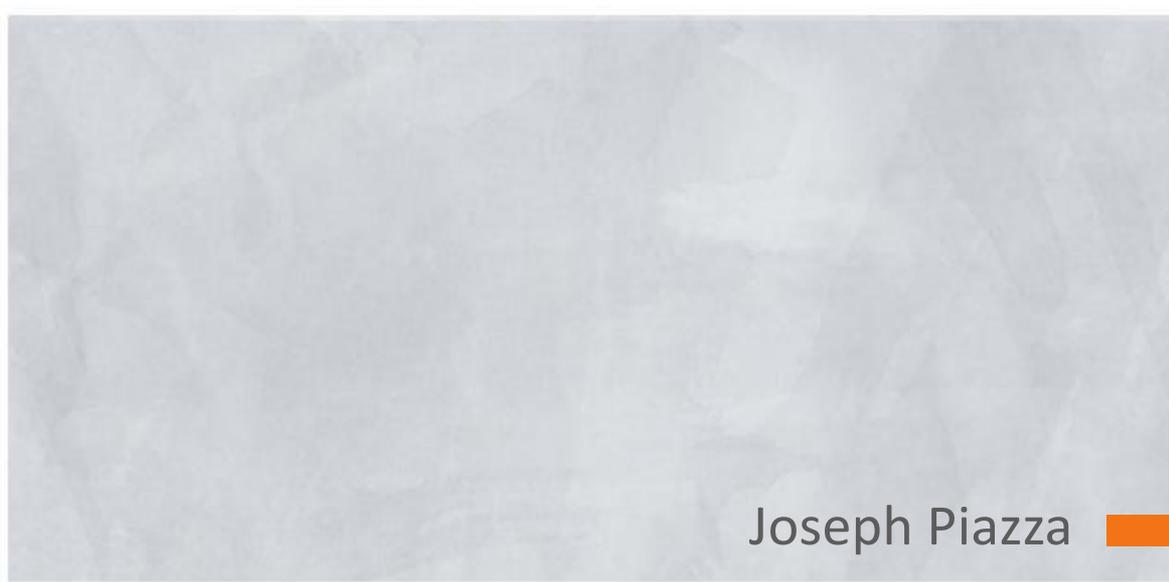
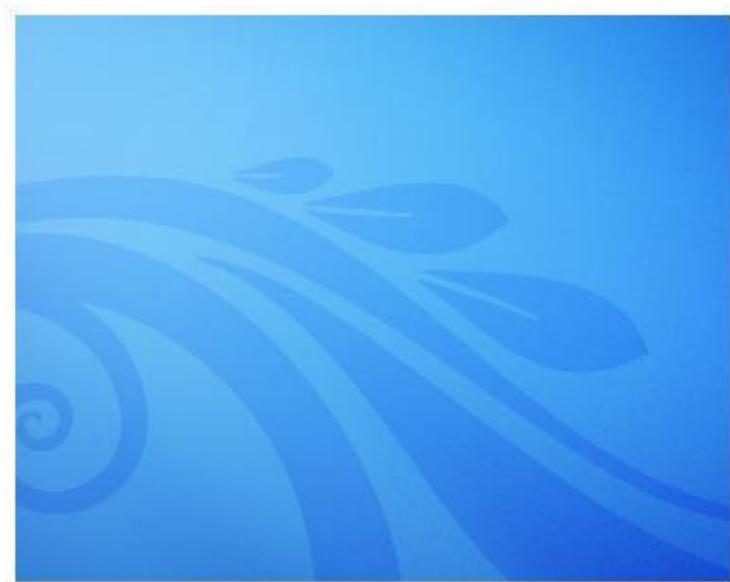
Forms and Training and Supervisor Checklist on Libraries HR TEAMS & USPS Webpage





Have we missed anything? 





Joseph Piazza



Thank You

