Overview

Performance Evaluation
Agenda for today

Why do an annual performance evaluation?
What is part of the evaluation?
How do quarterly check-ins and annual evaluations mesh?
What is the process and timetable?
Why are goals important?
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 28

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
  - Chair/Unit Head 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 position description
- Mechanism for merit
  - Equitable
  - Transparent
  - Standardized
Performance Evaluation Steps

0) Review content from quarterlies

1) Self assessment and review PD
   - To supervisor

2) Supervisor evaluation and review of PD
   - Chair/Unit Head review

3) Share with employee
   - Meet with employee

4) Finalize evaluation and PD
   - Submit to employee
   - Submit to Libraries HR by March 31st
Two Evaluation Formats

The Form –
For All USPS and hourly TEAMS employees

• Available as writable Word document
• Chair/Unit Head signature required
• Strongly encourage employee self assessment
• Top section information provided by HR
• Require overall rating

The Cover Sheet & Letter
For TEAMS exempt employees
Where are they?

**TEAMS/USPS**
- TEAMS NON-EXEMPT AND ALL USPS EVALUATION FORM
- TEAMS EXEMPT EVALUATION FORM
- POSITION DESCRIPTION TEMPLATE
- SUPERVISOR CHECKLIST FOR EVALUATION
- ADDITIONAL RATINGS GUIDE
- EVALUATION TRAINING
- QUARTERLY CHECK-IN: UF ENGAGED

**Faculty**
- EVALUATION EVALUATION COVERSHEET
- FACULTY REFERENCE RESOURCES

Libraries HR Webpage > Current Employees > Performance
TEAMS Non-Exempt, USPS Non-Exempt and USPS Exempt Performance Appraisal Form

Employee Name: 
Job Title: 
Appraisal Type: Annual
Appraisal Period: 

UF ID: 
Department: 
FTE: 

Note: Appraisal must be accompanied by a current Position Description signed by employee and supervisor.

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 employee no later than March 31. Forms should be emailed or delivered to Libraries Human Resources Office, Attn: Juliana Bogen; uf_lbr_hr@uflibrary.ufl.edu; Phone: (352) 273-2193.
Performance Categories

- Work Performance
- Attendance and Reliability
- Customer Service
- Initiative and Productivity
- Teamwork and Interpersonal Skills
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
**Performance Appraisal form for TEAMS Exempt Employees**

**Employee Name:**  
**Job Title:**  
**Department:**  
**UF ID:**  
**Appraisal Period:**  
**Overall Rating:**  

Note: Appraisal must be accompanied by a current Position Description signed by employee and supervisor.

**Appraisal Type:** Annual

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:** 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:** Falls 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 to 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.

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**Employee’s Name**  
**Employee’s Signature**  
**Date**

*Annual appraisals must be issued to, signed, and dated by employee no later than March 31. Forms should be emailed or delivered to Libraries Human Resources Office, Attn: Janessa Rujas, uf libr@ufl.edu, Phone: (352) 273-2305.*
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
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

Update Marston Library Service Desk training checklist for new hires by August 1, 2022, so that it can be used for new Fall student hires.
Development Goal - Example

Complete at least one training on Alma Analytics, then use this and other Alma Analytics documentation to create a report by February 28, 2023 for circulating tech usage during the Fall 2022 semester.
Tips for writing goals

• Don’t wait for your supervisor to suggest writing goals. Write 2 – 3 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?
UF Core Values

**OUR SHARED VALUES**

The University of Florida in 2015 adopted “The Decade Ahead” strategic plan comprising seven university wide goals and objectives and one overarching aspiration: That the University of Florida will be a premier university that the state, nation and world will look to for leadership.

In 2020, the university augmented the plan with the “UF Core Values” underpinning its goals and overarching aspiration with six central values. The values were shaped by input from all of UF’s key stakeholders to ensure they reflect the diverse UF community.

*To learn more about each value click on a section of the graphic at left.*
Have I missed anything?
Thank You