Annual Faculty Evaluation
May 15, 2021 – May 14, 2022
Hello

- Name
- Where you work
- How long you’ve worked in the Libraries
Agenda

- Importance of the process
- UF & Libraries Process
- Preparation of materials
- Supervisor role

- One take-away
Importance of the process

Are you too busy to improve?

No thanks!

We are too busy

Stop – **Reflect** – Learn
Importance of the process

- What have I done all year – overview
- What am I doing well?
- How can I improve?
- What are the
  - Skills,
  - Knowledge, and
  - Behaviors I need to be successful?
- Two-way conversation - insights
- Required
- Part of Tenure and Promotion process
UF and Libraries Process
Annual Faculty Evaluation

Resources

- United Faculty of Florida Contract – Article 18
- UF Regulations – UF-7.010
- Libraries Faculty Guidelines – Section IV
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Criteria

Evaluations are based on the 3 criteria used for Tenure & Promotion
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Criteria

Criteria I:
Professional Responsibility and Working Relationships

1. Mastery of job responsibilities
2. Effectiveness at fulfilling responsibilities
3. Commitment to University, Libraries, research librarianship
4. Development of good working relationships
9. TEACHING, ADVISING, AND INSTRUCTIONAL ACCOMPLISHMENTS

In no more than 750 words, describe your teaching, advising, professional responsibilities (Librarians), and/or instructional accomplishments. Provide a brief statement of how your activities promote inclusive excellence and opportunity in the classroom, in the lab, in the field, or any space where we supervise and inspire students, and the primary educational goals and outcomes of your teaching program.
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Criteria

Criteria II:
Research, Scholarship and Creative Activity

1. Scholarly Achievement (publications/presentations/etc.)
2. Creative Activities
3. Research Funding
13. CONTRIBUTION TO DISCIPLINE/RESEARCH NARRATIVE

In no more than 750 words explain your research/creative contribution to your discipline. ... If applicable, describe how your research supports inclusive excellence or highlights or addresses inequalities. There is no need to cite specific works or grants listed elsewhere in the packet.
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Criteria

Criteria III:
Service to the Libraries, the University, the State and the Profession

1. Service to the Library
2. Service to the University
3. Service to the State
4. Service to the Profession
19. SERVICE NARRATIVE

In no more than 750 words explain your participation in the governance processes and service to your unit(s), college, UF or external constituencies. Describe briefly how your engagement has impacted the constituencies for which the service is performed and contribute to inclusive excellence and opportunity.
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Ratings

Evaluations are based on 5 ratings
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Ratings

- **Exceptional**
  Faculty whose performance is at a very high level and who consistently and substantially exceed expectations incumbent upon their rank and as reflected in their annual goals and assignment, or who demonstrate unusual success in carrying out these responsibilities, will receive a letter of evaluation that contains a statement rating the performance as *exceptional*.

Any rating of Exceptional must be reviewed and approved by the Dean and Associate Deans prior to providing the faculty member with their proposed written evaluation.
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Ratings

- **Excellent**

  Faculty who meet and frequently exceed expectations incumbent upon their rank and as reflected in their annual goals and assignment will receive a letter of evaluation that contains a statement rating the performance as **excellent**.
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Ratings

- **Successful**

  Faculty who consistently meet expectations incumbent upon their rank and as reflected in their annual goals and assignment will receive a letter of evaluation that contains a statement rating the performance as **successful**.
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Ratings

Difference between Successful and Excellent - Considerations

- Meeting goals
- Sustaining existing or developing new services
- Effectiveness and impact
- Communication, collaboration and working relations
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Ratings

- Needs Improvement

Faculty who do not consistently meet expectations incumbent upon their rank and as reflected in their annual goals and assignment, will receive a letter of evaluation that contains a statement rating the performance as needing improvement.

Contact Libraries’ HR Office if overall is ‘Needs Improvement’
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Ratings

- Unsatisfactory

Faculty who frequently fail to meet all or a significant portion of the performance expectations incumbent upon their rank and as reflected in their annual goals and assignments will receive a letter of evaluation that contains a statement rating the performance as unsatisfactory. Performance at this level warrants corrective actions.

Contact Libraries’ HR Office if any Criteria is unsatisfactory
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Ratings

The annual evaluation should include a statement at the end of each "criterion entry" that describes the overall performance of that criterion.
Annual Faculty Evaluation

Ratings

A summary statement of the overall performance with an overall rating and a statement of the faculty’s progress towards tenure and/or promotion should conclude the annual letter of evaluation.
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Review Period

- 12 month faculty
  - May 15 – May 14

- 9 month faculty
  - August 15 – May 14
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Documents

1. Updated Curriculum Vitae
2. Annual activity report (outlines what was done)
3. Progress on goals for last year
4. Annual assignment (updated if necessary)
Annual Faculty Evaluation
Documents

5. Goals for coming year
6. Letter of evaluation from supervisor
7. Annual evaluation coversheet – with 2nd level supervisor signature
8. Response by faculty (if submitted)

Signatures on coversheet are submitted on FINAL submission
Annual Faculty Evaluation
Documents

Keep a full copy!

Electronic or Paper

It’s helpful to refer to throughout the year and you will need it for tenure & promotion
# Annual Faculty Evaluation

## Timeline

<table>
<thead>
<tr>
<th>Step</th>
<th>Due Date</th>
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<tbody>
<tr>
<td>Faculty submits Evaluation materials to supervisor</td>
<td>By 3/30*</td>
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<tr>
<td>Other evaluative reviews (if any) obtained</td>
<td>By 4/15*</td>
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<tr>
<td>Supervisor submits draft letter of evaluation for review by 2nd level supervisor</td>
<td>By 5/1</td>
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<tr>
<td>Supervisor provides Employee with proposed written Evaluation</td>
<td>By 5/15</td>
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<tr>
<td>Supervisor and employee meet to discuss Evaluation</td>
<td>By 5/31</td>
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<tr>
<td>Employee may submit a written response to any material used in the evaluation process</td>
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<tr>
<td>Complete Evaluation packet due to Library HR</td>
<td>By 6/30</td>
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* Required by Collective Bargaining Agreement
Preparation of Materials
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Considerations:

- Support of mentor in preparing documents for evaluation and goal setting.
- Mid-career review will provide feedback relevant to performance objectives and goals.
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Looking back
Annual Faculty Evaluation

Looking back

Annual activity report

based on previous annual assignment

- what have you accomplished?
- how have you done it?
- what was the impact?
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Looking back

Progress on goals

based on goals written last year

► what have you accomplished?
► how have you done it?
► what was the impact?
► what was not accomplished & why?
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Looking forward

The Annual Assignment
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Looking forward

Update Annual Assignment

The annual assignment outlines the duties and responsibilities of the position and provides a basis for planning and projecting activities for the coming year.

It should clearly and comprehensively detail the duties and responsibilities in all three criteria.
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Looking forward Annual Assignment

1. **Job responsibilities** – can be by category (Collections; Initiatives; Supervision) – What is expected of you?

   - Should reflect rank and level of responsibility (role as an expert; supervises 4 faculty; participates in management decisions for the unit, department, library)
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Looking forward Annual Assignment

2. **Scholarship** – includes presentations, publications, grants, creative works

Normally a general statement about responsibilities in this area
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Looking forward Annual Assignment

3. **Service** – can be by category (libraries; university; state; international; profession)

Normally a general statement about responsibilities in this area
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Looking forward
Setting Goals
review of last year is important but well written GOALS help predict future success

GOALS

‘a goal without a plan is just a wish’
## Annual Faculty Evaluation

### Goal Setting

<table>
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<tr>
<th>Performance Goals must be:</th>
<th>Specific and Strategic</th>
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<tbody>
<tr>
<td></td>
<td>Outline exactly what you hope to accomplish and why it is important. Tie it to the Libraries Strategic Directions</td>
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<tr>
<td>S</td>
<td>Measurable</td>
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<tr>
<td></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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<tr>
<td>M</td>
<td>Attainable</td>
</tr>
<tr>
<td></td>
<td>Not so lofty that you can’t achieve them and not so simple that you won’t be challenged.</td>
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<tr>
<td>A</td>
<td>Relevant</td>
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<td>The objectives must be relevant to the faculty rank, priorities and workload of the specific department and the Libraries</td>
</tr>
<tr>
<td>R</td>
<td>Timely</td>
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<tr>
<td></td>
<td>Need to have clear time frames attached to them.</td>
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Looking forward – setting goals

Your goals should always include the WHY – what’s the inspiration, what’s the significance, what’s the impact you want to make
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Looking forward – setting goals

Goal

Create greater collaboration with the College of Dentistry faculty by working with two of their faculty to design an online library instruction module by July
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Looking forward – setting goals

Goal

- To **better serve the needs of UF’s international students** work with the International Center to develop an outreach plan and create an annual schedule of library events.
- Schedule initial meeting by May 2022 and have a fully implemented plan by August 2022.
Supervisor

Writing letter of evaluation
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Supervisor Role

Things to consider:

- Departmental/Unit priorities
- Libraries Strategic Directions
- The letter is important now but also in the future – for tenure and/or promotion
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Supervisor Role

Writing letter of evaluation

- Review documents provided by faculty
- Last year’s letter
- Discuss any concerns, clarifications or questions prior to writing letter
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Supervisor Role

Writing letter of evaluation

- Review CDH section on performance evaluations
- Review the 5 tier evaluation ratings
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Supervisor Role

Writing letter of evaluation

- Consider any input from other individuals received throughout the year
- Other evaluative reviews (if any) obtained by 4/15
- Have 2nd level supervisor review draft PRIOR to sharing with faculty
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Supervisor Role

Writing letter of evaluation

- Date the letter
- Sign the letter
- Sign the cover sheet
- Have 2\textsuperscript{nd} level supervisor sign cover sheet
- Attach all faculty documents
- Keep a copy!
- Provide the faculty member with full and signed copy
- Submit to Libraries HR Office electronically
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Supervisor Role

- Solicit feedback on mentoring relationship (if either mentor or mentee)
Have we missed anything?
What is your ‘take away’?
Thank you

Bonnie J. Smith