

Library Human Resources Workshop

Annual Staff Performance Evaluations

UF | George A. Smathers
Libraries
UNIVERSITY *of* FLORIDA

February 8, 2024

Joe Piazza, Human Resources Associate

Logistics

This session is being recorded

I will stop at the end of each section for questions and for comments – Please refrain from using chat until those times

Closed captioning is turned on. To turn off -> Live Transcript -> Hide Subtitle

Agenda

Updates to Annual Performance Process and Format

Two Methods of Staff Performance Feedback

Performance Evaluation Form

Example Exercises

Libraries Staff Performance Evaluations Taskforce

- **Staff feedback from ClimateQUAL indicated a need to improve evaluation process**
- Spring 2022 – Taskforce composed of staff representing departments across the libraries, both in supervisory and non-supervisory roles reviewed professional literature on performance models and how other university libraries evaluate.
 - Special attention paid to key issues:
 - Inconsistency between Departments/Units in how scores are given
 - Score Inflation
- Fall 2023 – Taskforce provided recommendation to Joint Chairs and Deans
- Deans included an additional level of review to support supervisors who write evaluations that receive the highest rating

Key updates to Libraries' staff performance evaluations

Consistent format

- One form for all TEAMS and USPS employees. Form serves as summary/cover sheet
- All evaluations written in letter format

Updated performance categories & evaluation ratings:

- Numerical ranking system discontinued
- Maintain five ratings with new descriptive labels
- Performance categories expanded to seven groups

Coordination with UF Engaged to reduce redundancy:

- Annual evaluation replaces UF Engaged quarterly check-ins that fall in Feb. or March or April
- 3 UF Engaged check-ins + 1 annual evaluation per year

Staff evaluation process & timeline

January & February – Staff Evaluation and Position Description Trainings

February, 1st week – LHR emails supervisors to provide updates and timelines

February - Employee submits self-assessment and goals, and any suggested updates to position description to supervisor; LHR will reach out to **Chairs/Unit Heads** to schedule brief check-ins

March – Supervisors draft letters and goals, assign proposed ratings, send to **Chairs/Unit Heads** for review. **Chairs/Unit Heads** review & provide comments to supervisors

March 30th – Supervisors submit all *Exceptional*, *Needs Improvement*, and *Unsatisfactory* ratings to LHR for review to ensure library-wide consistency

April, 1st Week – Library Human Resources (LHR) provides constructive feedback to supervisors

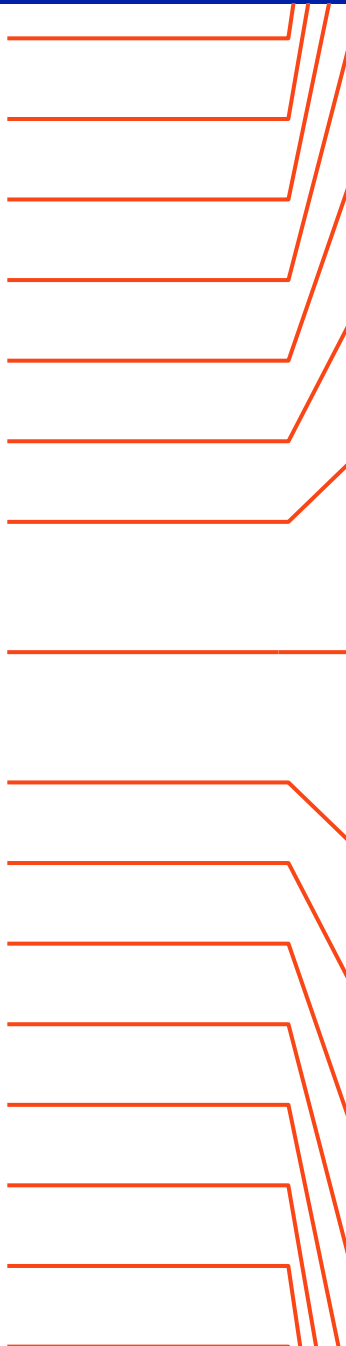
April 22nd Deadline – Prior to deadline, supervisors finalize evaluations, send to employees, meet with employees to discuss and make any necessary updates to position description, and send signed evaluations & position descriptions to LHR.

What does Library Human Resources review look like?

- LHR & Chairs/Unit Heads in February discuss strategies for effectively justifying *Exceptional* ratings; or developing plans for performance improvement
- LHR staff will review *Exceptional*, *Needs Improvement*, and *Unsatisfactory* ratings to assess:
 - **Exceptional ratings** – Justification that clearly and specifically describes how the employee has performed beyond their position description or enhanced performance of duties outlined in position description.
 - **Needs Improvement & Unsatisfactory** – Justification that clearly and specifically describes performance issues as relates to position description and provides a plan for improvement.

Break

Questions?



Staff performance feedback provided via two programs

UF Engaged

UF Wide

Quarterly

Quick Check-in

Timing based on start date

Resources provided by UFHR

Libraries Annual Evaluations

Libraries

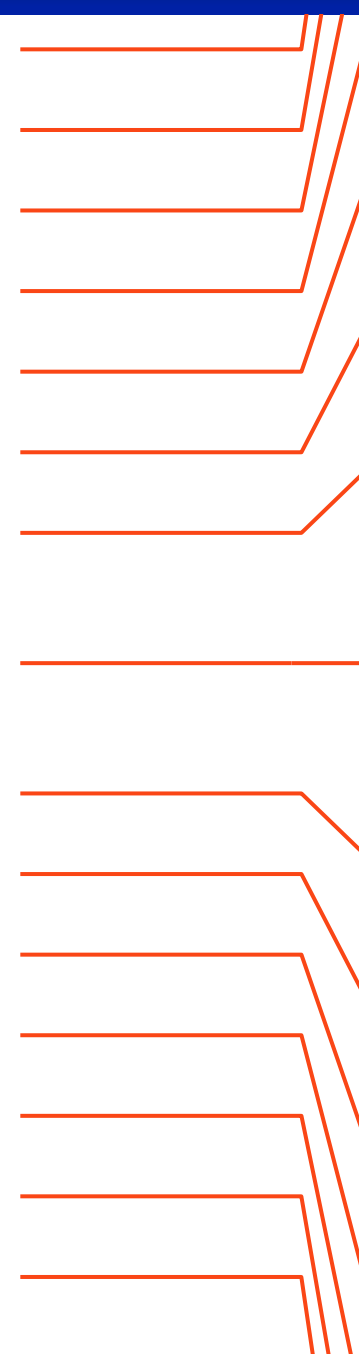
Annual

Comprehensive Check-in

Uniform timing: Due April 22, for period March 1 – Feb. 29

Resources provided by LHR

Focus of today's session



Libraries Performance Evaluation Form

USPS & TEAMS

Annual Performance Evaluation Form for George A. Smathers TEAMS & USPS Employees

Employee Name: Click or tap here to enter text.

UF ID: Click or tap here to enter text.

Job Title: Click or tap here to enter text.

Department: Click or tap here to enter text.

Evaluation Period: Click or tap here to enter text.

Choose Rating:

- Exceptional* Needs Improvement*
 Excellent Unsatisfactory*
 Successful

* Please contact Libraries Human Resources Office prior to issuing an overall rating of "Exceptional", "Needs Improvement" or "Unsatisfactory".

Have you received any degrees in the past year? (Please check the box if yes)

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

Supervisor Name

Supervisor Signature

Date

Chair/Unit Head Name

Chair/Unit Head Signature

Date

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 to my supervisor and Library Human Resources. Rebuttals/comments should be submitted to Human Resource Services within ten (10) working days of evaluation deadline.

Employee Name

Employee Signature

Date

Ratings

Exceptional*

Excellent

Successful

Needs Improvement*

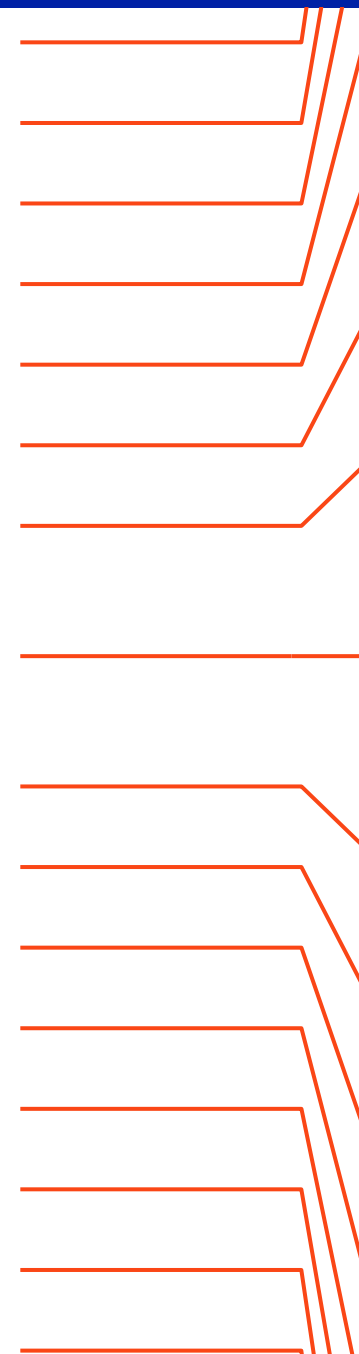
Unsatisfactory*



*Submit evaluation to
Libraries HR by March 30

Ratings

Exceptional	Surpassed expectations outlined in position description; Assumed additional responsibilities (either temporary or long term) to ensure the success of the unit; Recognized expert in their field, as indicated by specific examples. Please contact the Libraries Human Resources before assigning this rating.
Excellent	Consistently met and sometimes exceeded expectations outlined in position description; Demonstrated high productivity, and above-average expertise, consistently delivered high-quality results.
Successful	Consistently met the expectations outlined in position description; Can be relied on to fulfill duties and played a critical role in the functioning of the libraries.
Needs Improvement	Has not successfully performed a portion of the essential functions outlined in position description; While successful in some duties, fell short in others. A performance improvement plan is required. Please contact the Libraries Human Resources Office before assigning this rating.
Unsatisfactory	Consistently failed to successfully perform a significant portion of essential functions outlined in position description. A performance improvement plan is required. Please contact the Libraries Human Resources Office before assigning this rating.



Seven Performance Categories

- *Work Performance, Reliability, Initiative, Problem Solving, and Productivity
- *Teamwork, Communication, and Interpersonal Skills
- Customer Service / End-User Service / Service Relationships
- Leadership and Advisory Skills
- Professional Development, Training, Certifications Earned
- Service to the Department, Libraries, and/or the University
- Awards, Publications, Grant Work, Presentations, Exhibits, Outreach

*Relevant to all employees

Use other categories as relevant

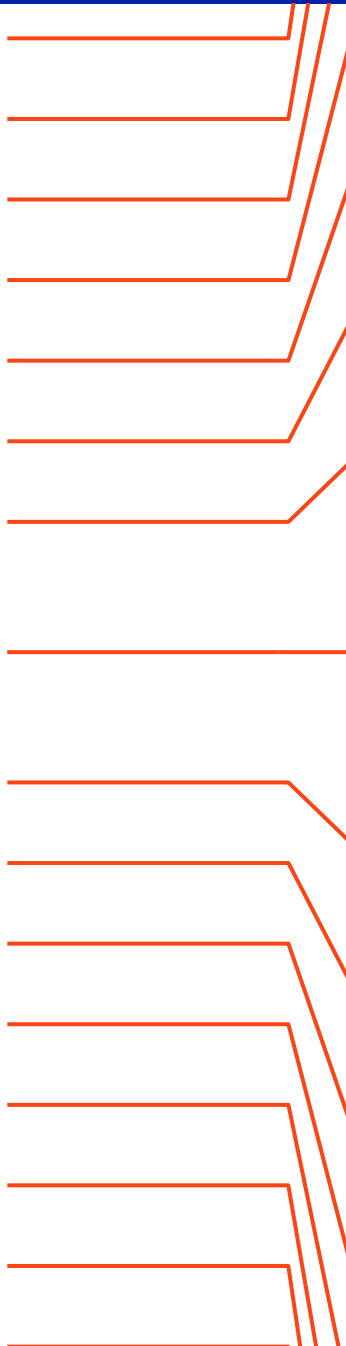
Tips for writing self-assessments & evaluation letters

- Base self-assessments on position descriptions (2024 position description workshops)
- Use quarterly check-ins to remember highlights and key events
- Structure according to evaluation categories—use the categories that are relevant to position. You do not need to use all seven categories
- Reference annual evaluation categories in Quarterlies can be helpful when using quarterlies to inform annuals
- Use subheadings and/or bullet points to emphasize highlights
- Write 2-3 smart goals for the upcoming year

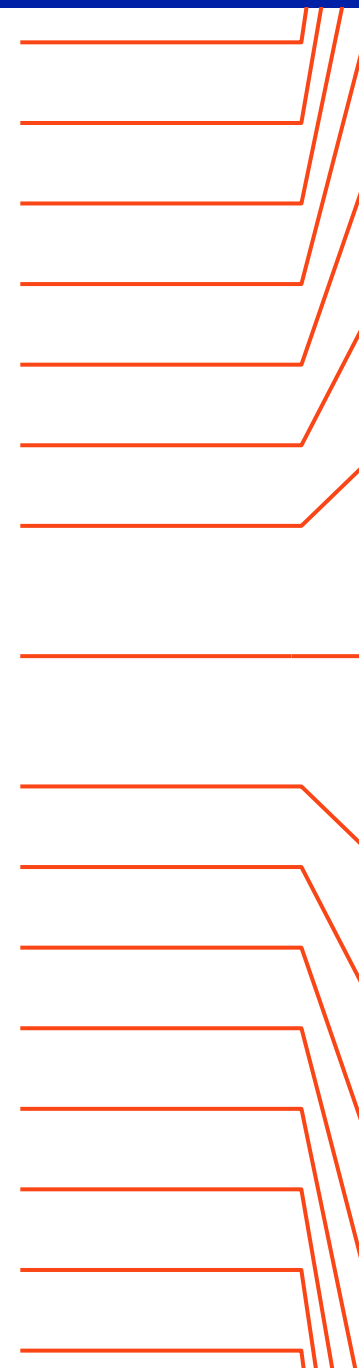
**Provide examples/be specific – especially when making a case for
Exceptional, Needs Improvement, or Unsatisfactory ratings**

Break

Questions?



Let's practice!



Willow

PD:

Supervises & coordinates student workers

Manages user operations

Collaborates with facilities for building maintenance



<https://forms.gle/MG5oGHQ5QPzx28Ss5>

Highlights from quarterlies & self-assessment:

Provided critical support for building remediation following flood

Successfully maintained staffing, with high retention rates

Played a key role in maintaining department functioning by taking on additional duties while a vacant position was filled.

Place each highlight in one of the 7 performance categories

Determine a rating, and provide a brief rationale

Raven

PD:

Process library loans

Answer patron questions

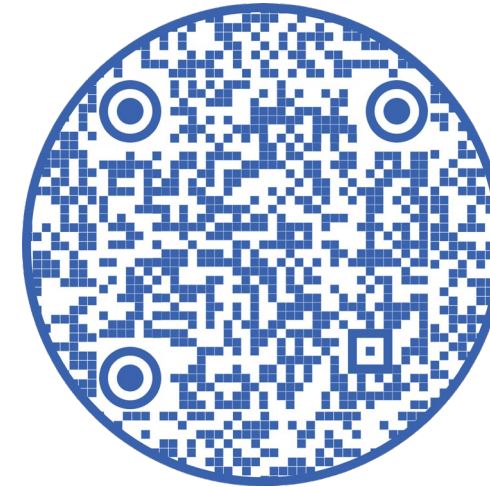
Provide social media and website services for unit

Highlights from quarterlies & self-assessment:

Awarded customer service excellence award

Developed new guidelines for social media brand that enhanced student involvement with posts

Consistently processed loans in a timely manner



<https://forms.gle/9dAEn4YtPpr3RQ3r9>

Place each highlight in one of the 7 performance categories

Determine a rating, and provide a brief rationale

River

PD:

Provides end-user support for library staff

Manages software licensing

Assists with technology budgeting

Highlights from quarterlies & self-assessment:

Consistently addressed end-user needs within one business day

Served on two staff search committees

Led team focus groups and then developed a new webpage for unit to reflect team mission and values with special attention to accessibility



<https://forms.gle/MkouuUmtDEBNt5EX9>

Place each highlight in one of the 7 performance categories

Determine a rating, and provide a brief rationale

Conclusions & next steps

- Attend the Position Description training to learn how to keep your PD up to date or update one for someone you supervise
- If Staff, begin working on self-assessment
- Supervisors and employees should communicate throughout the evaluation process
- Review staff evaluation resources on [Libraries HR Performance webpage](#)

Library Human Resources

352-273-2595