

How Am I Doing?

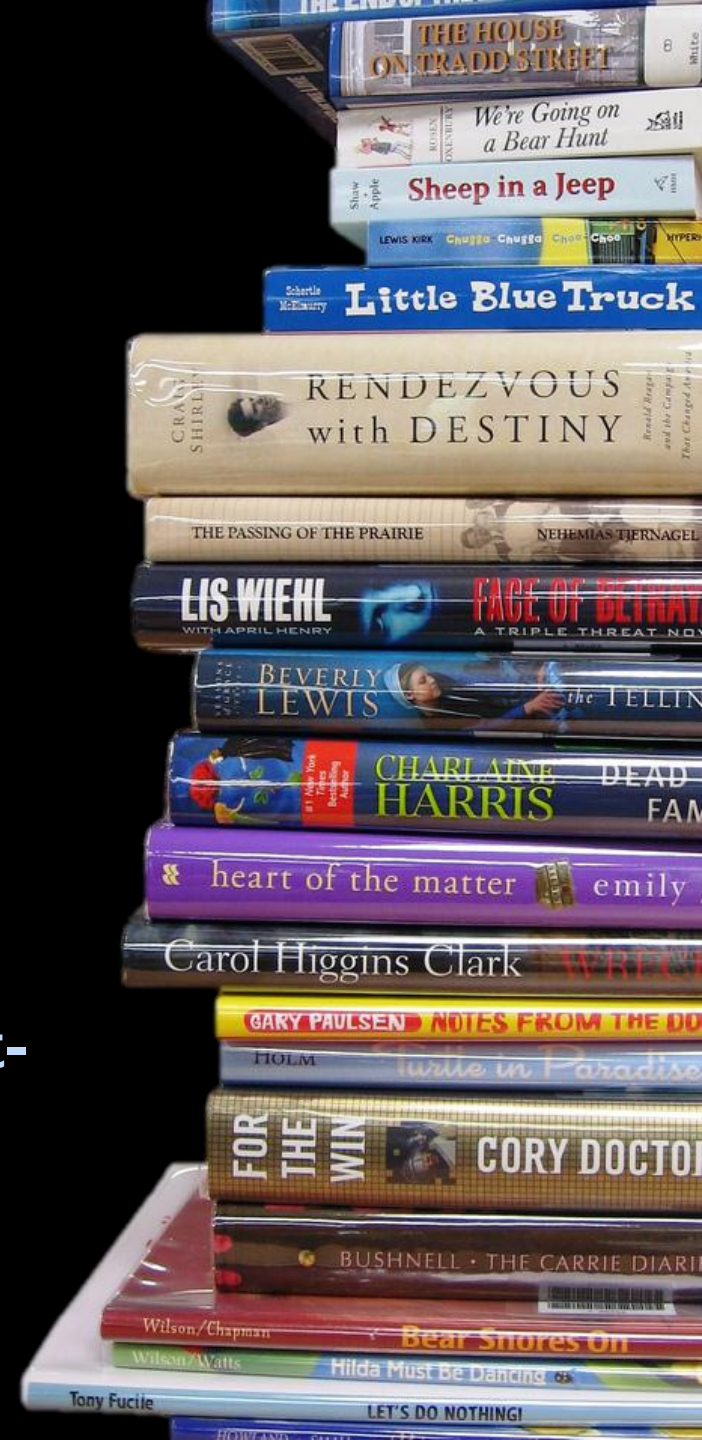
Raising the Bar on Performance Management



Lynn Hoffman
Deputy Director
Naperville Public Library

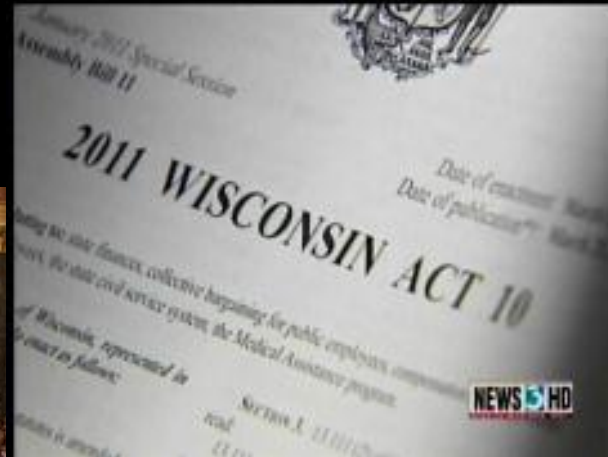
Brown County Library – Green Bay, Wisconsin

- Brown County population: 250,000
- Central Library + 8 branches & bookmobile
- Collection: 500,000 items
- Annual circulation: 2.6 million
- Annual visits: 1.2 million
- 130 employees: 54 full-time, 76 part-time (87 FTE)
- Budget: \$7 million – 62% personnel



ACT 10 CHANGED EVERYTHING

Without contracts, BCL had to develop personnel policies and procedures from scratch.



WORK RULES COMMITTEE

A cross-section of staff from throughout the library came together to work through personnel issues with transparency and respect.

Ground Rules

No eye-rolling

One conversation at a time

Be on time

Treat each other with respect

Don't interrupt – let others express themselves

In this room, we're all on the same level – leave your title at the door

Every idea is a good idea – talking about other people's ideas makes them even better ideas

Speak clearly and distinctly for conference calls

Identify yourself when you speak for those participating remotely

Have RESPECT for ideas, people, and time

Listen to what other people are saying – pay attention

Grievance process	Other leave (bereavement, jury duty, etc.)
Complaint process	Uniform allowance
Harassment policy	Mileage reimbursement
Existence of unions	Applying for internal positions
Attendance	Probation
Personal appearance	Job descriptions and classifications
Use of library services by staff	Volunteers
Employee conduct (including confidentiality, prohibited conduct)	Performance appraisals
Pay, including overtime/comp time	Disciplinary action
Work hours and schedules, including flex time	Separation from employment/termination
Work breaks/meal breaks	Rehiring staff members
Seniority	Emergency closure of the Library
Health/Dental/Life Insurance	Emergency call-back
Pro-rated benefits for part-time staff	Staff development
Vacation time	Culture of positive work environment -- staff are respected & valued -- expectations both ways
Casual leave or Sick time	Employee Assistance Program
Long-term and short-term disability	
Retirement contributions	
Holidays	

BAD PERFORMANCE REVIEWS

Stereotypes about performance reviews only slightly exaggerate evaluations done badly.



BAD FORMS

Forms that are one-size-fits-all end up being less than useful for almost everyone.

PERFORMANCE EVALUATION FOR NON-PROBATIONARY EMPLOYEES

Procedure: The evaluator shall refer to the employee's job description when completing the evaluation instrument and share the evaluation results with the employee. Both the evaluator and the employee should sign the evaluation. The employee signature indicates that he/she has read the evaluation but does not necessarily indicate the employee concurs with the evaluation. A copy of the evaluation should be given a copy for his/her records.

The original evaluation form(s) shall be retained by the unit for six years following separation of the employee.

Please evaluate the employee's job performance by checking the appropriate box next to each attribute on the following scale:

U=unsatisfactory; NI=needs improvement; S=satisfactory; AA=above average; E=excellent; NA=not applicable

ATTRIBUTE TO BE EVALUATED	U	NI	S	AA	E	NA
Quantity of work extent to which the employee meets job requirements on a timely basis						
Quality of work extent to which the employee's work is thorough, effective and accurate						
Knowledge of job extent to which the employee knows and demonstrates all phases of assigned work						
Cooperation with others extent to which the employee gets along well with others; responds positively to direction and adapts well to changes; shows tact, courtesy and effectiveness in dealing with others						
Judgment extent to which the employee makes sound job-related decisions, develops alternative solutions and recommendations and selects proper course of action; understands impact of decisions and actions						
Attendance, reliability and dependability extent to which the employee is not absent and contacts supervisor concerning absences on a timely basis; can be depended upon to be available for work; assumes responsibilities and ensures tasks are followed to completion						
Planning and organizational effectiveness extent to which the employee meets deadlines, manages resources, and effectively balances tasks and priorities						
Communication extent to which the employee effectively conveys information and ideas to others; clarity of oral and written communications						
Initiative and creativity extent to which the employee is self-directed, resourceful and creative in meeting job objectives; follows through on assignments; initiates or modifies ideas, methods or procedures to meet changing circumstances or needs						
Supervisory ability (if applicable) extent to which the employee applies sound practices in executing his/her supervisory responsibilities; demonstrates skill in arousing interest and enthusiasm in subordinates; effectively selects and develops personnel						

Performance Evaluation

Employee Name:	SLAC ID:	Manager Name:
Manager / Supervisor: [No] [v]	Scientist / Physicist: [No] [v]	Rating Factors
Position:	This position Matrixed: [No] [v]	7=Consistently Exceeds All Expectations 6=Frequently Exceeds Expectations 5=Sometimes Exceeds Expectations 4=Consistently Meets All Expectations 3=Meets Most Expectations 2=Needs Improvement 1=Does NOT Meet Expectations 0=N/A(Not Applicable)
We have reviewed the STA and other requirements: [No] [v]		
Feedback from the Functional Manager is included in this evaluation: [N/A] [v]		
We have reviewed the position summary and made necessary updates: [No] [v]		

Essential Competencies

Complete for all employees (All Competencies Must be Rated.)

Adjustment Factor

The Essential Competencies represent the core measures of performance for all employees. The adjustment factor allows the evaluator to indicate if a competency has a somewhat greater or somewhat lesser importance for the employee being evaluated.

Assign an adjustment to each: C = Critically Important, I = Important, S = Satisfactory, NI = Needs Improvement, U = Unsatisfactory. You can elect to weigh up to two competencies as 'Critically Important (C)', and one as 'Important (I)'. All other competencies will be weighted as 'Satisfactory (S)'. Do not select 'Needs Improvement (NI)' or 'Unsatisfactory (U)' for any competency.

Competency	Rating	Adj. Factor
Attention to Safety: Participates in creating a culture of safety by working in a safe manner; reports unsafe situations and accidents; follows safety and computing security procedures; requests and uses safety equipment and safety techniques; and participates in safety training. Exercises Stop Work appropriately.	[v]	[v]
Quality of Work: Accuracy, thoroughness, achievement of end results with a minimum of error, commitment to continuous improvement and problem prevention.	[v]	[v]
Quantity/Timeliness of Work: The amount of work accomplished and the extent to which commitments are met on schedule.	[v]	[v]
Job Knowledge: Level of expertise in field of work and the extent this expertise is used effectively. The extent to which new information and skills are updated and applied, understanding of work responsibilities and job tasks, as well as judgment exercised.	[v]	[v]
Interpersonal Skills: Communicates clearly, builds relationships, collaborates well with others, works as part of team and promotes teamwork among others. Ability to express differing views appropriately.	[v]	[v]

EMPLOYEE PERFORMANCE EVALUATION

Employee Name:	Job Title:
Date of Evaluation:	Period of Review:
Reviewer's Name:	Reviewer's Title:
Reason for Review: <input type="checkbox"/> Annual <input type="checkbox"/> Merit <input type="checkbox"/> End of Unrated/Probation Period <input type="checkbox"/> Other	

RATINGS KEY

C Outstanding: Employee performs all job duties in an exceptional manner.	E Improvement Needed: Job performance is satisfactory in most, but not all job duties.
A Very Good: Exceeds most job requirements and high quality in all key areas of work.	S Satisfactory: Employee fails to perform many duties well and/or has some minor improvement.
S Satisfactory: Adequately performs all duties of the job.	N/A Not Applicable: For Unrated Period.

- JOB KNOWLEDGE:** Understands job requirements and is prepared to perform on job related matters.
Enter Rating: (Check One) C A S E NI U
- ATTENDANCE AND PUNCTUALITY:** Consistently adheres to work schedule and responsibilities.
Enter Rating: (Check One) C A S E NI U
- INITIATIVE AND CREATIVITY:** Takes the lead in solving problems and developing new ideas to improve work.
Enter Rating: (Check One) C A S E NI U
- ADAPTABILITY AND FLEXIBILITY:** Changes work methods and adapts to new work conditions.
Enter Rating: (Check One) C A S E NI U
- JUDGMENT:** Makes sound decisions and takes appropriate action on complex situations.
Enter Rating: (Check One) C A S E NI U
- PLANNING AND ORGANIZATION:** Effectively manages time, schedules and prioritizes work.
Enter Rating: (Check One) C A S E NI U

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What are performance appraisals used for?

- Meeting expectations
- Constructive criticism
- Positive feedback
- Training needs
- Promotion
- Pay raise, bonus
- Face-to-face
- Reviewing accomplishments
- Setting goals
- Personal growth
- Written documentation
- Brainstorming
- Big picture

What should performance appraisals be used for?

The ultimate purpose of performance appraisal in any organization is to **improve** the performance of the organization.

PERFORMANCE MANAGEMENT

This holistic approach to performance applies to the employee and to the organization, and is made up of much more than just a review form.

- Aligns employee performance to organizational objectives
- Communicates performance expectations to employees for shared understanding
- Recognizes and acknowledges good performance
- Identifies areas where employee development would improve performance

PROBLEMS WITH RATINGS

Rating systems are often arbitrary, and are hard to keep from becoming subjective.



- A. **JOB KNOWLEDGE:** extent of job information and understanding possessed by employee.
Satisfactory _____ Improvement needed _____
Comments: _____
- B. **EFFECTIVENESS IN DEALING WITH PEOPLE:** extent to which employee cooperates and maintains productive working relationships with patrons and other staff with whom he/she comes in contact.
Satisfactory _____ Improvement needed _____
Comments: _____
- C. **ACCURACY:** correctness in performance of work duties.
Satisfactory _____ Improvement needed _____
Comments: _____
- D. **INITIATIVE:** extent to which employee is a "self starter".
Satisfactory _____ Improvement needed _____
Comments: _____
- E. **JOB ATTITUDE:** amount of interest, enthusiasm, and positive intent shown on the job.
Satisfactory _____ Improvement needed _____
Comments: _____
- F. **DEPENDABILITY:** extent to which employee can be counted upon to carry out instructions.
Satisfactory _____ Improvement needed _____
Comments: _____
- G. **ATTENDANCE:** extent to which employee regularly arrives on time and keeps absences to a minimum.
Satisfactory _____ Improvement needed _____
Comments: _____
- H. **PHYSICAL AND VERBAL APPEARANCE:** extent to which employee dresses appropriately, presents a clean, well groomed appearance, and uses proper English.
Satisfactory _____ Improvement needed _____
Comments: _____

PROBLEMS WITH RATINGS

Rating categories may not apply to all jobs, or may not be entirely under the employee's control.

PROBLEMS WITH RATINGS

No matter how thorough or thoughtful the review itself, ratings focus employee attention on the low scores.

EMPLOYEE PERFORMANCE REPORT

Name: _____ Title: _____ Review Date: _____

LIBRARY _____

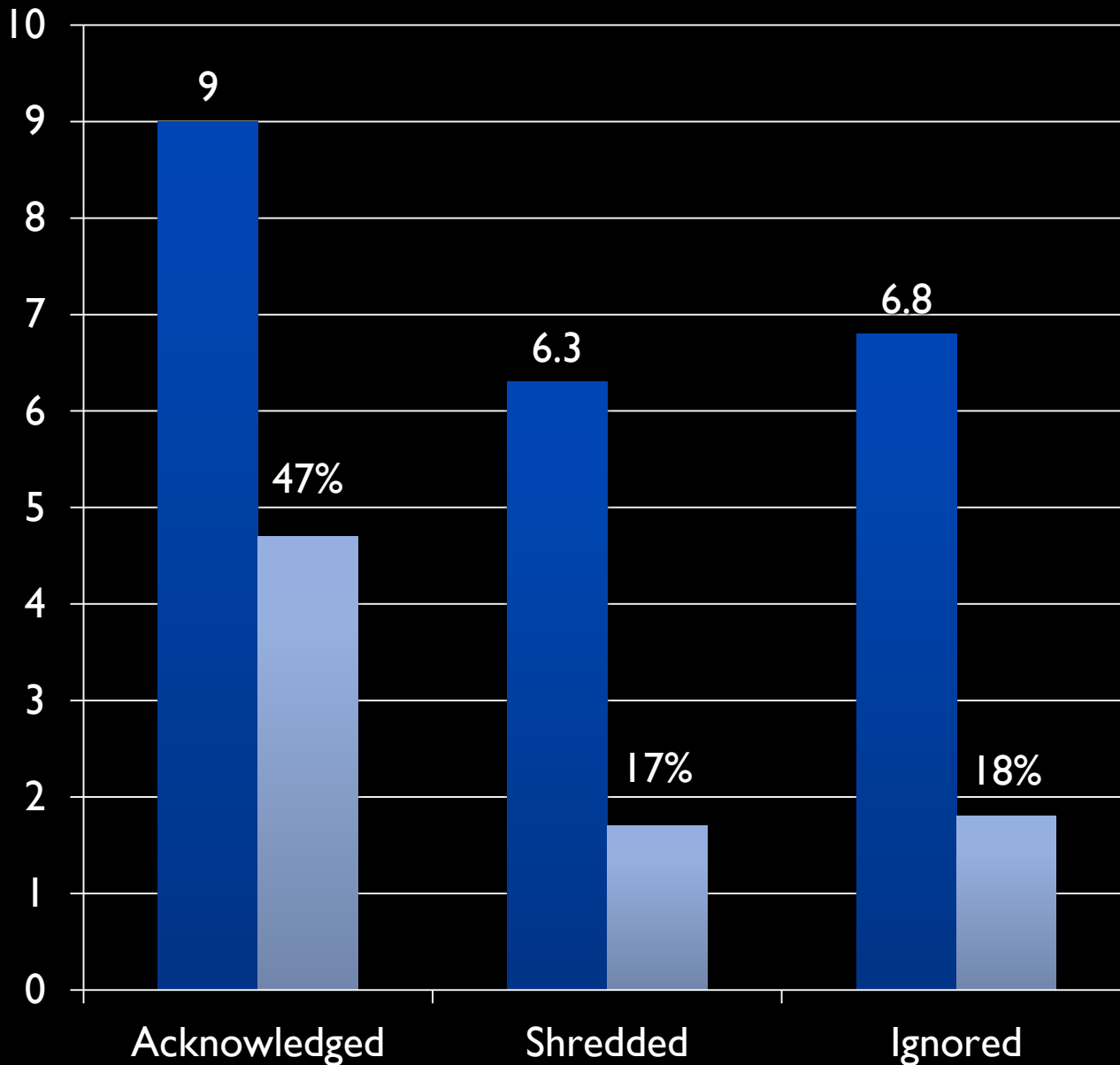
Review Type: _____

PERFORMANCE FACTORS: 1 - Unsatisfactory (Job Targets)
2 - Improvement Needed (Possible Job Targets)
3 - Satisfactory
4 - Very Good
5 - Outstanding

Please indicate performance level by checking appropriate box. Performance factors evaluated as Improvement Needed or Unsatisfactory must be explained in the comment section and have corresponding job target(s) done.

	1	2	3	4	5
1. Attendance; absenteeism; punctuality; remaining on the job.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. Quality of work; accuracy; neatness; thoroughness; competence.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3. Work habits; observes work and safety rules; follows instructions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4. Initiative; self-starter; finds work to do; self-motivated.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5. Dependability; the degree to which employee can be relied upon to get the job done.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
6. Relations with other employees; cooperativeness; ability to get along with coworkers.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
7. Quantity of work; acceptable amount of work accomplished.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
8. Adaptability; ability to adjust to new or different assignments.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
9. Judgment and common sense; ability to make sound decisions and take correct actions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
OPTIONAL FACTORS (EVALUATE IF APPROPRIATE TO JOB):					
1. Public contact; manner in dealing with and helping the public.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. Planning and organizing work; effective and efficient utilization of time and resources.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3. Communication (oral and written); effective expression; how well ideas are understood.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4. Supervisory ability; leadership; getting work done through others; training subordinates.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5. Management ability; effective and economical management of department, division or program.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

COMMENTS:



FEEDBACK

Absence of feedback is almost as counter-productive as actively destroying someone's work.

- Average Worksheets Completed
- Percent Who Completed 10 or More



NO SURPRISES

Ongoing, regular feedback ensures that there are no surprises when it's time for the formal performance review.



TWO-WAY COMMUNICATION

Effective feedback is a conversation between the employee and the supervisor. Employees are as responsible for asking for feedback as supervisors are for giving it.

NO FEEDBACK SANDWICHES

Surrounding negative feedback with positive feedback only conditions employees to ignore the positive.



Feedback Should Be:

- Descriptive rather than evaluative
- Specific rather than general
- Focused on things the employee can control
- Well-timed
- Checked to ensure it is understood
- Owned by the giver
- Based on observed behavior

FEEDBACK MODEL

All staff were trained on the BRAT/BRET model for giving and receiving feedback.

	For Something Positive	For Something Negative
Why?	Business reason	Business reason
When?	Often / Immediately	Immediately
Where?	Publicly or privately	Privately
How?	BRET	BRAT
	Behavior: Be specific.	Behavior: Be specific.
	Reactions: Ask for theirs, then give yours.	Reactions: Ask for theirs, then give yours.
	Effects: Describe the effects of the behavior on you, the team, the organization.	Alternatives: Ask for theirs, then give yours.
	Thanks.	Thanks and Tracking.

KEEP PERFORMANCE SEPARATE

Research suggests that for performance evaluation to be worthwhile, it needs to be done separately from personnel decisions, including promotion, pay and disciplinary action.



COLLABORATION

Goal-setting and assessment will be more successful if performed in collaboration between employee and supervisor.



NEW JOB DESCRIPTIONS

BROWN COUNTY LIBRARY POSITION DESCRIPTION

Position Title: Library Service Assistant

Location: Central Library – Circulation
Ashwaubenon Branch
East Branch
Kress Family Branch (De Pere)
Pulaski Branch
Southwest Branch
Weyers-Hilliard Branch (Howard)
Wrightstown Branch

Reports To: Library Supervisor or Branch Coordinator

Department: LIBRARY

Representation Unit: Clerks

JOB SUMMARY:

Library Service Assistants work with library materials throughout the circulation process: checking out items to customers, checking in returned materials, re-shelving and retrieving library materials, and maintaining library collections in a neat and orderly fashion to ensure easy access.

ESSENTIAL DUTIES:

1. Maintains the order and neatness of collections throughout the Library – 50-80%
 - a. Sorts materials by call number prior to shelving
 - b. Re-shelves library materials to the proper locations and shifts as necessary
 - c. Ensures that materials are in the correct order on the shelves (Shelf Reading)
 - d. Maintains attractiveness of the Library by picking up materials from seating areas, straightening shelves and filling displays
2. Performs general circulation and customer service functions – 10-40%
 - a. Uses library circulation system or self-check stations to check out to customers
 - b. Checks in returned materials
 - c. Prepares and processes delivery among library locations
 - d. Processes holds, including receiving hold items and making holds available for pickup
 - e. Uses the library catalog or WorkFlows to search for items
 - f. Places holds on items for customers
 - g. Uses cash register or cash drawer to receive payment for fines and fees
 - h. Registers users, processes new library card applications and activates new cards

Essential Duties:

Duties are grouped by major area

Each area includes a time estimate

NEW JOB DESCRIPTIONS

3. Assists library staff with other branch or department functions – 5-20%
 - a. Searches for library materials from printouts and lists
 - b. Provides customers with basic directions to library locations, or refers to service desks as appropriate
 - c. Assists customers in finding specific items on shelves
 - d. Performs duties related to library opening and closing

SECONDARY DUTIES:

- a. Provides customer assistance with computers
- b. Answers informational and directional questions
- c. Performs basic repair of library materials
- d. Supports library programs for adults, young adults and children
- e. Collects, sorts and delivers mail
- f. Alerts other library staff to customer behavior issues
- g. Performs other related duties as needed or assigned

MINIMUM QUALIFICATIONS REQUIRED:

Education and Experience:

- High School Diploma; or enrollment in high school with passing grades in current classes; or any equivalent combination of education, training and experience which provides the necessary knowledge, skills and abilities
- Must be at least 16 years old.

Licenses and Certifications:

- Candidates under age 18 must obtain and present a work permit prior to appointment

Knowledge, Skills and Abilities:

1. Basic knowledge of library operations, services and materials
2. Strong verbal and written communication skills
3. Ability to assess users' needs and provide consistently exceptional customer service
4. Ability to represent the Library in a responsible, professional and trustworthy manner
5. Ability to adapt to changes in the work environment
6. Ability to maintain a calm demeanor under stressful or unsettling circumstances
7. Ability to follow detailed verbal and written instructions
8. Ability to work independently with minimum supervision
9. Ability to work efficiently while paying close attention to detail
10. Ability to multitask and prioritize
11. Ability to establish and maintain cooperative and courteous working relationships with staff and the public
12. Ability to meet the flexible scheduling needs of the Library
13. General mathematics skills
14. Basic general computer skills, including keyboarding, word processing and email
15. Library computer skills, including searching, circulation and database use

Knowledge, Skills and Abilities:

Use consistent language from job
to job

NEW JOB DESCRIPTIONS

16. Ability to use library and general office equipment, including computer, printer, photocopier, telephone and cash register

PHYSICAL DEMANDS:

- Lifting 40 pounds maximum with frequent lifting and carrying of objects weighing up to 30 pounds
- Pushing and pulling objects weighing up to 50 pounds
- Frequent sitting, standing, walking, kneeling and climbing
- Using hand(s) for repetitive single grasping, fine manipulation and operating controls
- Frequent bending, twisting, squatting and reaching
- Communicating orally in a clear manner
- Distinguishing sounds at various frequencies and volumes
- Distance vision sufficient to distinguish people or objects under a variety of light conditions
- Vision sufficient to view computer screens and spine labels under a variety of light conditions

EXPECTATIONS:

All Brown County Library employees are expected to:

1. Uphold public library ethics and values, keeping information about customers and their use of the library confidential, and treating every customer with professionalism and dignity.
2. Follow the policies and operating procedures established by the Library Board, Library administrators, and supervisors.
3. Help other library staff members with the same commitment as Library customers. All employees are responsible for contributing to an atmosphere of teamwork and camaraderie.
4. Be at the Library on time and ready to begin work at the beginning of their scheduled shifts.
5. Represent the Library positively by dressing and behaving appropriately.
6. Show respect for all customers and coworkers. By meeting this expectation, Assistants will ensure that no customer complaints are received about their behavior.
7. Communicate clearly, both orally and in writing. This includes communicating information or concerns with coworkers or supervisors.
8. Stay up-to-date with information about the job and about the Library by reading memos, emails, etc. at least once per shift.

Library Service Assistants are expected to:

9. Re-shelve returned materials quickly and correctly, achieving an average rate of speed of at least 75 items re-shelved per hour and an average accuracy rate of 97%.
10. Keep shelves and seating areas neat and attractive as a part of regular day-to-day work.
11. Ensure that library materials are checked in and out accurately and promptly.
12. Consistently use good customer service behaviors, such as making eye contact, smiling, and presenting open body language.
13. Greet all library users with a smile, make eye contact, and ask, "Did you find everything you were looking for?"
14. Demonstrate good judgment by referring customer questions, other than directional questions, to service desks.
15. Share observations and suggestions for improving work efficiency or customer service with supervisors.

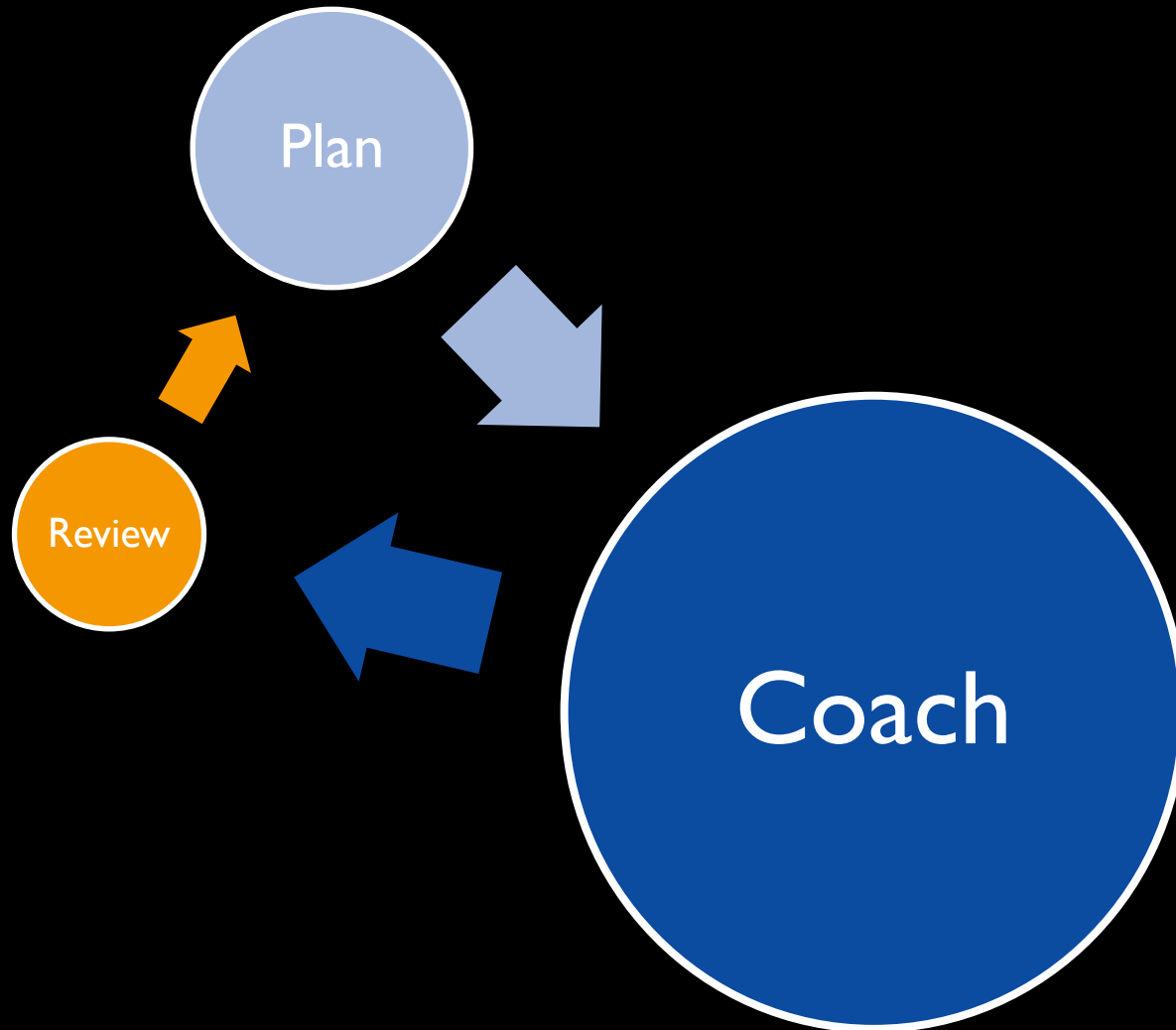
Expectations:

Identify standards for performance

Describe the "how" of the job

PERFORMANCE MANAGEMENT MODEL

The cycle starts with planning and ends with review, but ongoing coaching and feedback is the biggest, most important part.



Supervisor Instructions

- Schedule a meeting with the employee. The meeting should take place at least 14 days after you inform the employee of the meeting, so that he or she has enough time to prepare. Fill in the date and time below.
- Give this worksheet to the employee, along with an up-to-date copy of the employee's job description.
- The employee should return a copy of this worksheet to you 2-3 days before the scheduled meeting so that you have time to review it and prepare for the meeting. Fill in the due date below.

First Performance Plan – Employee Worksheet

Name: _____

Note: This worksheet is not part of your official Performance Plan!

This is just a tool to help you start thinking about your own work, and to help you and your supervisor prepare for your first planning meeting. Giving a copy of the completed worksheet to your supervisor a few days before your meeting will make your discussion as focused and productive as possible.

The purpose of the review process is *not* to find things wrong with your work. Instead, you and your supervisor should focus on ways to help the Library provide the best possible service to our communities by making you a stronger employee, and making sure you have the resources and opportunities you need to be successful.

Your meeting is scheduled for _____
(date and time)

Please fill out this worksheet and return a copy to your supervisor by _____
(date)

Look over the **Essential** and **Secondary Duties** sections of your job description.

1. Which duties do you feel you perform particularly well?

2. Are there duties you feel you could perform better if you had additional practice, training, or resources?

3. List **major** duties that are not included in your job description (if applicable).

Look over the **Knowledge, Skills and Abilities** section of your job description.

4. Which of these do you feel are your strengths?
(This can be a *hard* question to answer. If you're having trouble, try thinking about it this way: In which areas do your coworkers come to you first when they get stuck or need help?)

5. Are there areas where strengthening your knowledge, skills or abilities would help you do a better job?

Look at the **Expectations** section of your job description.

This section helps to define what good performance looks like for all of our jobs, and it gives you and your supervisor a road map for what is expected of you in your job, so that you can make sure you are working together toward the same goals.

6. Which expectations do you already meet? Which expectations do you regularly exceed?

7. Are there obstacles that you feel might keep you from meeting a particular expectation?

Please note any other issues or concerns that you would like to discuss in your meeting.

In your first planning meeting, you and your supervisor will identify 3-5 objectives for your work in the coming months that will help the Library meet its goals. If completing this worksheet has already given you some ideas, write them down here.

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2. Are there duties you feel you could perform better if you had additional practice, training, or resources?

3. List major duties

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Your meeting is scheduled for _____
(date and time)

Please fill o

Look over the Essential and :

1. Which duties do y

2. Are there duties y

3. List major duties

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Look at the Expectations section of your job description.

This section helps to define what good performance looks like for all of our jobs, and it gives you and your supervisor a road map for what is expected of you in your job, so that you can make sure you are working together toward the same goals.

6. Which expectations do you already meet? Which expectations do you regularly exceed?

Look over the Essential and Secondary Duties sections of your job description.

1. Which duties do you feel you perform particularly well?

2. Are there duties you feel you could perform better if you had additional practice, training, or resources?

3. List major duties that are not included in your job description (if applicable).

the coming months that will
them down here.

Supervisor Instructions

- Schedule a meeting with the employee. The meeting should take place at least 14 days after you inform the employee of the meeting, so that he or she has enough time to prepare. Fill in the date and time below.
- Give this worksheet to the employee, along with an up-to-date copy of the employee's job description.
- The employee should return a copy of this worksheet to you 2-3 days before the scheduled meeting so that you have time to review it and prepare for the meeting. Fill in the due date below.

First Performance Plan – Employee Worksheet

Name: _____

Note: This worksheet is not part of your official Performance Plan!

This is just a tool to help you start thinking about your own work, and to help you and your supervisor prepare for your first planning meeting. Giving a copy of the completed worksheet to your supervisor a few days before your meeting will make your discussion as focused and productive as possible.

The purpose of the review process is *not* to find things wrong with your work. Instead, you and your supervisor should focus on ways to help the Library provide the best possible service to our communities by making you a stronger employee, and making sure you have the resources and opportunities you need to be successful.

Your meeting is scheduled for _____
(date and time)

Please fill out this worksheet and return a copy to your supervisor by _____
(date)

Look over the Essential and Secondary Duties sections of your job description.

1. Which duties do you feel you perform particularly well?

2. Are there duties you

3. List major duties that

Look over the Knowledge, Skills and Abilities section of your job description.

4. Which of these do you feel are your strengths?
(This can be a hard question to answer. If you're having trouble, try thinking about it this way:
In which areas do your coworkers come to you first when they get stuck or need help?)

5. Are there areas where strengthening your knowledge, skills or abilities would help you do a better job?

Look at the Expectations section of your job description.

This section helps to define what good performance looks like for all of our jobs, and it gives you and your supervisor a road map for what is expected of you in your job, so that you can make sure you are working together toward the same goals.

6. Which expectations do you already meet? Which expectations do you regularly exceed?

7. Are there obstacles that you feel might keep you from meeting a particular expectation?

Please note any other issues or concerns that you would like to discuss in your meeting.

Look over the Knowledge, Skills and Abilities section of your job description.

4. Which of these do you feel are your strengths?
(This can be a hard question to answer. If you're having trouble, try thinking about it this way:
In which areas do your coworkers come to you first when they get stuck or need help?)

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First Performance Plan

Employee:	Employee ID:
Job Title:	Department:
Meeting Date:	Supervisor:

Do you understand the core Expectations for your job? Yes No

Do you and your supervisor share an understanding of your Essential Duties? Yes No

List major duties that are not included in your job description.

Based on your discussion, you and your supervisor will develop a set of work, performance and training objectives for you to work toward over the next six months. Your supervisor will help you make sure that each objective is specific and measurable so that you can tell when you have been successful.

Work Plan		
Your work helps the Library provide quality service to our community. Decide on 1-2 objectives you and your supervisor have for your work in the next six months that will help the Library meet its goals, and determine how you will know whether or not you have met each objective. An example of a work objective might be to increase your competency in finding specific information on the WorkFlows display user screen.		
Key Work Objective	What does success look like?	Possible Obstacles
1.		
2.		

Performance Plan		
Having expectations for your performance not only helps you make sure that your work is done well; it also gives you opportunities to grow and develop as an individual. With your supervisor, choose 1-2 expectations from your job description, and plan what actions you will take to improve how well you meet or exceed them. An example of a performance objective might be to improve your shelving speed to an average of 85 items per hour.		
Key Performance Expectation	Actions for Improvement	Possible Obstacles
1.		
2.		

Training Plan		
Library work changes constantly, and there is always something new to learn. With your supervisor, identify 1-2 areas in which additional or continued training in the next six months would improve your ability to perform your job. A training objective could address a possible obstacle in your Work or Performance Plans. It could also strengthen a particular skill, provide experience in a new area, or give you the opportunity to perform one of your current duties better.		
Training Objective	Relationship to Duties/Expectations	Possible Activities
1.		
2.		

After your meeting:

- Your supervisor will take what you discuss and use it to complete a final draft of this form. He or she will put any additional thoughts in the supervisor comments section, sign the completed form, and give to you within one week of your planning meeting.
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- The original will be added to your personnel file. You and your supervisor will each receive a copy.

Your Supervisor's Comments:

Supervisor Signature	Date

Your Comments:

Employee Signature	Date

First Performance Plan

Employee:	Employee ID:
Job Title:	Department:
Meeting Date:	Supervisor:

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Yes

No

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Performance Plan
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Key Performance Ex
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Meeting Date:	Supervisor:

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Performance Plan	
Having expectations for your performance not only helps you make sure that your work is done well; it also gives you opportunities to get feedback, clarify your job description, and plan for your future. Identify 1-2 performance objectives for your work in the next six months.	
Key Performance Objective	How will you know you have met this objective?
1.	
2.	

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Library work changes constantly, and there is always something new to learn. With your supervisor, identify 1-2 areas in which additional or continued training in the next six months would improve your ability to perform your job. A training objective could address a possible obstacle in your Work or Performance Plans. It could also strengthen a particular skill, provide experience in a new area, or give you the opportunity to perform one of your current duties better.		
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Supervisor Signature	Date

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BUILDING TRUST

The Work Rules Committee put a lot of effort in to clear and regular communication about the process and its intent, to help allay fears about the new process.





HOW CAN YOU DO IT?

What if you can't start from scratch? Can you put together a combination of tools that achieve the same result?

- Their form + Your form?
- Your form + parts of Their form?
- Their job description +
- Your expectations?

01

I know what is expected of me at work.

02

I have the materials and equipment I need to do my work right.

03

At work, I have the opportunity to do what I do best every day.

04

In the last seven days, I have received recognition or praise for doing good work.

05

My supervisor, or someone at work, seems to care about me as a person.

06

There is someone at work who encourages my development.

07

At work, my opinions seem to count.

08

The mission or purpose of my company makes me feel my job is important.

09

My associates or fellow employees are committed to doing quality work.

10

I have a best friend at work.

11

In the last six months, someone at work has talked to me about my progress.

12

This last year, I have had opportunities at work to learn and grow.

FOCUS ON FEEDBACK

If you can't start from scratch, focus on training everyone to give and receive feedback effectively, and encourage regular, ongoing coaching and feedback as part of your process.



FOCUS ON IMPACT

If you can't start from scratch, focus on the things that will have the biggest impact on the Library's performance.

Some Resources

- Tom Coens, *Abolishing Performance Appraisals: Why They Backfire and What to Do Instead*
- Samuel A. Culbert, *Get Rid of the Performance Review!*
- Alfie Kohn, *Punished By Rewards: The Trouble with Gold Stars, Incentive Plans, A's, Praise and Other Bribes*



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