

Progress Report:  
*Revision of the Libraries'  
Performance Review Process*

May 2006

Performance Review Task Force  
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# Definitions

- Performance **Review** = the annual process
- Performance **Discussion** = the oral part of the process
- Performance **Assessment** = the written form used in the process
- Performance **Assessment Period** = months when forms are completed and discussions are held
- **Salary Review** = the annual assignment of merit increases based on benchmark ratings

# What's working?

- ☺ Recognition that Performance Review is a valuable exercise
- ☺ Parts of our current form are useful
  - job responsibilities
  - list of accomplishments
  - obstacles to progress
  - goals and strategies

# NOT working

☹ Performance Review and Salary Review are disconnected

- process should reflect new benchmarks
- timing needs to be related and clarified

# NOT working

- ☹ Performance factors are rigid and overlapping
  - expand/broaden range of factors
  - allow more flexibility in their application
  - encourage more written narrative

# NOT working

- ☹ Process is onerous for long-term, consistent performers
  - optional short form in alternate years

# What else did we hear?

- Self evaluation is useful
- Process should be applied consistently across all staff
- Goal setting is central to the process, including a review of last year's goals
- Grades should NOT be applied to individual performance factors; include overall benchmark rating somewhere in the Performance Review Process

# Emerging Goals

- Strengthen ties to Benchmark ratings
- Balance consistency with flexibility
- Encourage meaningful dialog
- Refresh forms
- Increase accountability

# *Proposed* Timing

- Support Staff Calendar

- Oct thru Dec: Performance Assessment Period
- January: Benchmark ratings due
- February: Benchmark ratings communicated back to employees
- End of March: Salary letters distributed
- April: New salaries effective

- Administrative Staff Calendar

- Jan thru Mar: Performance Assessment Period
- April: Benchmark ratings due
- May: Benchmark ratings communicated back to employees
- End of June: Salary letters distributed
- July: New salaries effective

# *Proposed* Forms Exchange

- Employee's self assessment due to Supervisor two weeks prior to discussion
- Supervisor's assessment due to Employee two days prior to discussion

# *Proposed* Forms

- Regular forms for all staff
  - Self-assessment form
  - Performance (Supervisor) assessment form
- Short form
  - 3+ years in same job w/ same supervisor
  - alternate years
- Waiver form
  - special circumstances w/ AD approval

Please give us your feedback  
by Friday, June 2nd

- Make appointment with TF member
- Web site for anonymous feedback
- Email to any or all TF members

Implementation GOAL...

*July 1, 2006*