

## **Developing Truly Effective Performance Evaluations Webinar Handouts**

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Toledo Lucas County Public Library  
2016

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### Websites:

Toledo Lucas County Public Library  
Association of Public Library Employees

<http://toledolibrary.org>

<http://www.aple5242.org>

Toledo Lucas County Public Library – Main Library





**TOLEDO  
LUCAS COUNTY  
PUBLIC  
LIBRARY**

**Performance Evaluation  
Circulation Clerk I/II/III**

Employee Name:

Supervisor:

Time Period in Review:

Annual/Probation:

Agency/Department:

Position: **Circulation Clerk I/II**

Date of Hire:

Last Evaluation date:

**Overall Summary:**

| <b>Customer Service</b>   | <b>Does Not Meet Expectations</b> | <b>Meets Some Expectations</b> | <b>Meets Most Expectations</b> | <b>Fully Meets Expectations</b> | <b>Exceeds Expectations</b> |
|---|-----------------------------------|--------------------------------|--------------------------------|---------------------------------|-----------------------------|
| Assists customers with solving circulation problems and concerns, makes eye contact, sincerely greets customers, and speaks in a friendly manner.                                     |                                   |                                |                                |                                 |                             |
| Assists customers with technology and library equipment (i.e. photocopying, scanner).   |                                   |                                |                                |                                 |                             |
| Greets all customers with a pleasant and helpful attitude, utilizes all means possible to ensure customer leaves satisfied, and never exhibits a value judgment (s) on a customer(s). |                                   |                                |                                |                                 |                             |
| Demonstrates customers as the number one priority; promptly pauses other tasks to assist customers.   |                                   |                                |                                |                                 |                             |
| Exhausts all means available to resolve a difficult customer situation prior to engaging the supervisor.  |                                   |                                |                                |                                 |                             |
| Strengths:  |                                   |                                |                                |                                 |                             |
| Development Goals (SMART):  |                                   |                                |                                |                                 |                             |

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| <b>Circulation</b>   | Does Not Meet Expectations | Meets Some Expectations | Meets Most Expectations | Fully Meets Expectations | Exceeds Expectations |
|--|----------------------------|-------------------------|-------------------------|--------------------------|----------------------|
| Consistently checks material in and out quickly and accurately.  |                            |                         |                         |                          |                      |
| Processes card applications completely and accurately.   |                            |                         |                         |                          |                      |
| Counts cash drawer accurately and within the allotted time frame.  |                            |                         |                         |                          |                      |
| Processes delivery in the appropriate time frame.  |                            |                         |                         |                          |                      |
| Performs accurate searches for hold items in the appropriate time frame.   |                            |                         |                         |                          |                      |
| Maintains a neat and organized work area.  |                            |                         |                         |                          |                      |
| Performs open and closing procedures as instructed.  |                            |                         |                         |                          |                      |
| Interprets all of the customer information stored and follows the guidelines for placing comments in patron records. |                            |                         |                         |                          |                      |
| Negotiates customer fines in a professional and effective manner.  |                            |                         |                         |                          |                      |
| Strengths:   |                            |                         |                         |                          |                      |
| Development Goals (SMART):   |                            |                         |                         |                          |                      |

| <b>Policy/Procedure Adherence</b>   | Does Not Meet Expectations | Meets Some Expectations | Meets Most Expectations | Fully Meets Expectations | Exceeds Expectations |
|---|----------------------------|-------------------------|-------------------------|--------------------------|----------------------|
| Knows and understands policies and procedures. Can explain them clearly to customers and other staff. Seeks input from Supervisor when necessary. |                            |                         |                         |                          |                      |
| Is fair when enforcing library policies and procedures. Adapts flexibly to situations when appropriate.   |                            |                         |                         |                          |                      |
| Consistently follows directions and performs high quality work.   |                            |                         |                         |                          |                      |
| Answers the telephone in alignment with TLCPL common greeting and telephone training.   |                            |                         |                         |                          |                      |
| Strengths:  |                            |                         |                         |                          |                      |
| Development Goals (SMART):  |                            |                         |                         |                          |                      |

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| Technology  | Does Not Meet Expectations | Meets Some Expectations | Meets Most Expectations | Fully Meets Expectations | Exceeds Expectations |
|---|----------------------------|-------------------------|-------------------------|--------------------------|----------------------|
| Adheres to rules governing staff computer use and use of personal mobile devices (e.g. cell phone, ipad, iphone, ipod, etc.). |                            |                         |                         |                          |                      |
| Shows willingness to learn new skills as technology is updated or replaced.   |                            |                         |                         |                          |                      |
| Successfully passes technology core competency evaluation.  |                            |                         |                         |                          |                      |
| Strengths:  |                            |                         |                         |                          |                      |
| Development Goals (SMART):  |                            |                         |                         |                          |                      |

| Teamwork  | Does Not Meet Expectations | Meets Some Expectations | Meets Most Expectations | Fully Meets Expectations | Exceeds Expectations |
|---|----------------------------|-------------------------|-------------------------|--------------------------|----------------------|
| Gets along with others and can work as a part of a diverse group or across departments. |                            |                         |                         |                          |                      |
| Positively contributes to team interactions and morale.                                 |                            |                         |                         |                          |                      |
| Willingly contributes to team tasks and the achievement of team goals.                  |                            |                         |                         |                          |                      |
| Strengths:  |                            |                         |                         |                          |                      |
| Development Goals (SMART):  |                            |                         |                         |                          |                      |

| Communication   | Does Not Meet Expectations | Meets Some Expectations | Meets Most Expectations | Fully Meets Expectations | Exceeds Expectations |
|---|----------------------------|-------------------------|-------------------------|--------------------------|----------------------|
| Communicates, honestly, and respectfully to others. Maintains personal and professional boundaries of communication at all times. |                            |                         |                         |                          |                      |
| Is considerate when relaying negative or critical information; resolves conflicts skillfully.                                     |                            |                         |                         |                          |                      |

|   |  |  |  |  |  |
|---|--|--|--|--|--|
| Conveys spoken and written messages in a clear, concise, and timely manner. |  |  |  |  |  |
| Checks emails regularly and responds in a professional and timely manner.   |  |  |  |  |  |
| Strengths:  |  |  |  |  |  |
| Development Goals (SMART):  |  |  |  |  |  |

| <b>Professionalism</b>  | <b>Does Not Meet Expectations</b> | <b>Meets Some Expectations</b> | <b>Meets Most Expectations</b> | <b>Fully Meets Expectations</b> | <b>Exceeds Expectations</b> |
|---|-----------------------------------|--------------------------------|--------------------------------|---------------------------------|-----------------------------|
| Consistently maintains a positive, 'can do attitude.'   |                                   |                                |                                |                                 |                             |
| Maintains individual and shared workspace in an orderly condition.  |                                   |                                |                                |                                 |                             |
| Adheres to appropriate standards of dress and behavior.   |                                   |                                |                                |                                 |                             |
| Records work schedule in the Kronos database on or before the established deadline.   |                                   |                                |                                |                                 |                             |
| Reliably adheres to work schedule and provides advance notice for vacation, appointments, and personal leave.   |                                   |                                |                                |                                 |                             |
| Reports to work on time and is ready for duty at the start of the scheduled shift.  |                                   |                                |                                |                                 |                             |
| Attains the required number of annual training credits.   |                                   |                                |                                |                                 |                             |
| Uses time appropriately including prioritizing critical tasks from less critical tasks.   |                                   |                                |                                |                                 |                             |
| Works independently and takes initiative to complete everyday circulation tasks such as delivering a truck of books, running paging lists, organizing items on a truck, shelf reading, verifying registration applications, or adding bar codes to magazines. |                                   |                                |                                |                                 |                             |
| Strengths:  |                                   |                                |                                |                                 |                             |
| Development Goals (SMART):  |                                   |                                |                                |                                 |                             |

Supervisor Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Manager Signature: \_\_\_\_\_

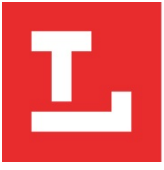
Date: \_\_\_\_\_

Employee Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**Rating Scale Definitions:**

| <b>Rating</b>                     | <b>Definition</b>   |
|-----------------------------------|---|
| <b>Does Not Meet Expectations</b> | Employee is not performing the required parts of the job proficiently. Improvement plan will be developed to increase the skills to an acceptable level.        |
| <b>Meets Some Expectations</b>    | Employee is performing the position proficiently some but not all of the time. SMART goals will be developed to increase the performance from some to most/all. |
| <b>Meets Most Expectations</b>    | Employee is performing most of the job duties proficiently most of the time. SMART goals will be created to assist the employee with further career mastery.    |
| <b>Fully Meets Expectations</b>   | Employee has reached master fluency. SMART goals might be developed to further strengthen this skill.   |
| <b>Exceeds Expectations</b>       | Employee is consistently delivering results beyond expectations/goals. SMART goals might be developed to teach and/or train others.                             |



## Employee Evaluation Input Form



Employee Name: 34T

Date: 34T

Evaluation Year:

Manager(s):

### Guidelines:

This worksheet offers you the ability to provide your manager with job-related performance input before the performance evaluation is written. The intent of the pre-performance evaluation worksheet is to enhance one-on-one communication between you and your manager before the evaluation is developed. Please respond to the following questions and be prepared to discuss the responses with your manager.

- 1. Please review the attached performance evaluation form. There are eight areas of competency that your performance evaluation covers. Based on these criteria and the work you've done since your last evaluation, what are most proud of working on or accomplishing?**

34T

- 2. Please list any accomplishments that you haven't already mentioned and discuss any strengths you'd like to highlight.**

Are there Committees that you served on? Have you received any formal recognition for your work?

34T

- 3. Please describe any new goals you would like to complete in the next review cycle.**

34T

- 4. How can your manager help you achieve your new goals?**

34T

- 5. Please list any Professional Development opportunities or activities you are interested in for the next review cycle.**

34T

- 6. Do you have any other comments about your performance?**

34T

## General starter phrases for discussing SMART goals during the evaluation

### Setting the tone:

The evaluation is a tool we use to assess how we are doing and to plan for (the next few months, six months, year etc...)

This is a chance to look back on the past year and make a plan for the next one

You and I will use the evaluation as a starting point to discuss your areas of strength and areas where there is room for growth. It will be very similar to our one-on-one discussions.

### SMART Goals for Growth of existing skill:

This goal will allow you to take your experience to the next level

This goal will help expand on your \_\_\_\_\_ (storytimes, RA, committee work etc..). You are doing so well with this, I want to help you keep going on this track.

### SMART Goals for Improvement:

This is an area where I think we can work together (use as an opener)

Reading this article and discussing it will help us get on the same page regarding \_\_\_\_\_ (customer service, planning, cooperation etc...)

This goal will serve as a guide for some changes to improve \_\_\_\_\_

As a branch we are focusing on \_\_\_\_\_ this goal is what I need from you to help the team meet our goal.

### When things get emotional:

A goal does not indicate an area of failure. It is my job to continuously coach and support you. I am providing everyone with goals.

Your role will help support the branch as a team. You do great work.

We will work on this together

I am here to support you, please think about what you need from me so we can make a plan together

I understand receiving feedback can be difficult, would you like to take some time to think about this and we can talk again \_\_\_\_\_ (tomorrow, after the weekend, *set a clear time*)



## Evaluation Writing Tips

### Good Practices:

- Identifying how a person's job helps the mission of TLCPL is a great way to cascade a higher sense of team work from a system perspective and recognize the value the employee contributes. Example: Bertha's day-to-day efforts and interactions with customers demonstrate her commitment to the mission of TLCPL. Her communication consistently reflects the values of TLPL.
- When discussing an area for development, be sure to use similar verbiage and circumstances from previous discussions so the employee understands the history or evolution of the issue.
- Use the one-on-one meeting time for explanation and dialogue.
- Recognize and refer to the employee input sheets. Identify areas of mutual agreement and explain differences.

### Things to try and avoid:

- Be careful not to place contradictory messages, for example:
  - Strength/Comment: Employee has an excellent rapport with customers of all ages.
  - Development Goal: Beginning immediately, modify your message to meet the comprehension level of young children.
- If any area has multiple "meets some expectations" ratings, a SMART goal should be created.
- Be careful to place comments that are job related more than reflective of a personality. For example;
  - Employee is very friendly, gracious, and hard working.
  - Employee's customer service skills are excellent; she/he is fully performing all duties of the job.
- Try not to read directly from the evaluation instead walk through it explaining and providing context on what you have written.
- Don't specifically write within the evaluations names of people who provided input. Instead explain this and identify it verbally.
- Try and avoid SMART goals that are already a part of required training. For example: Complete the core competency assessment once made available

### Don't do these.... Please:

- Never place a word in all caps – this sets a negative tone and the extra emphasis is not necessary.
- Don't include improvement based/conduct/corrective action in the evaluation that has not been previously discussed with the employee. Do not include personal/manager notes from previous disciplinary meetings. You may want to consult HR in this instance.
- Do not require employees to do job related things on their own time (this includes soft skill development).

# GOAL TRACKER FOR \_\_\_\_\_

| EVALUATION GOAL (Examples)  | NOTES/DISCUSSED ON  | DEADLINE      | COMPLETE           |
|---|---|---------------|--------------------|
| Demonstrate how to download (Zinio, Hoopla, books, music) any of our services to 2 different co-workers or a customer(s).   | Reviewed during Dec. 15 HAT meeting. Hoopla demo was fantastic; needs more work with Flipster. Agreed to check in again during Jan. 15 HAT meeting.         | January 2015  |                    |
| Increase speed while unpacking delivery (cite current example of speed). Delivery should be unpacked by 10am and on the reserve shelf by 11am. Achieve this proficiency within 3 months.        | Have met several times to observe/coach toward this goal. Recommend extending the deadline to January 2015 and pairing the employee with a peer to observe. | December 2014 | Not complete       |
| Work toward writing clear yet concise messages in patron accounts. Share with supervisor 5 messages added to patron accounts that contain detailed information that is listed in a concise way. | <ul style="list-style-type: none"> <li>- Jan 2015, 2 good messages</li> <li>- Feb 2015, 1 good message</li> <li>- Mar 2015, 2 good messages</li> </ul>      | April 2015    | Yes, as of 3/31/15 |
|   |   |               |                    |
|   |   |               |                    |
|   |   |               |                    |



# Performance Evaluation

## Librarian I/II-

Employee Name:

Manager:

Time Period in Review:

Annual/Probation:

Agency/Department:

Position:

Date of Hire:

Last Evaluation date:

**Overall Summary:**

| Customer Service  | Does Not Meet Expectations | Meets Some Expectations | Meets Most Expectations | Fully Meets Expectations | Exceeds Expectations |
|---|----------------------------|-------------------------|-------------------------|--------------------------|----------------------|
| 1. Greets customers with a pleasant and helpful attitude: promptly pauses other tasks, makes eye contact, speaks in friendly manner, thanks customer for visit and encourages him/her to return |                            |                         |                         |                          |                      |
| 2. Utilizes all means possible to ensure customer leaves satisfied, and does not exhibit a value judgment on a customer   |                            |                         |                         |                          |                      |
| 3. Exhausts all means available to resolve a difficult customer situation prior to engaging the manager   |                            |                         |                         |                          |                      |
| 4. Answers the telephone in alignment with TLCPL training standards   |                            |                         |                         |                          |                      |
| 5. Assists customers with various machines, devices, and technology within the library  |                            |                         |                         |                          |                      |
| Strengths/Comments:   |                            |                         |                         |                          |                      |
| Development Goals (SMART):  |                            |                         |                         |                          |                      |

\*Not all responsibilities apply to each individual. Note n/a if an item is not applicable to the individual being reviewed.

| Librarianship/Programming   | Does Not Meet Expectations | Meets Some Expectations | Meets Most Expectations | Fully Meets Expectations | Exceeds Expectations |
|---|----------------------------|-------------------------|-------------------------|--------------------------|----------------------|
| 1. Provides reader's advisory to children, teens and adults<br>a. Demonstrates awareness of current popular authors/films/music<br>b. Actively suggests read/view/listen-alikes   |                            |                         |                         |                          |                      |
| 2. Interprets library tools according to established procedures<br>a. Demonstrates ability to find items in catalog and collection<br>b. Demonstrates awareness of and ability to use helpful web sites, services and databases   |                            |                         |                         |                          |                      |
| 3. Assists in collection development by sharing purchase suggestions and actively redistributing and weeding materials following established procedures<br>a. Demonstrates knowledge of Suggestion Tool and Redistribution Tool and exploring availability of items in SearchOhio & OhioLink<br>b. Thoughtfully redistributes and weeds collection on an ongoing basis following established procedures and timelines |                            |                         |                         |                          |                      |
| 4. Maintains specialized/specific areas of the collection   |                            |                         |                         |                          |                      |
| 5. Demonstrates ability to be innovative in approaches to customer service<br>a. Conducts effective reference interviews by actively listening and encouraging customer input<br>b. Demonstrates collaborative approach to reference work, asking for and offering assistance to/from peers   |                            |                         |                         |                          |                      |
| 6. Plans, implements and evaluates engaging programs for children, teens and/or adults<br>a. Follows internal procedures for Marketing/IT/Program attendance data and other inter-departmental protocols  |                            |                         |                         |                          |                      |
| 7. Assists in compiling reference and other statistical data; may assist in developing reporting systems (such as for grants and assessment/evaluation purposes)  |                            |                         |                         |                          |                      |
| 8. Participates in committee and/or outreach work, for the Library and/or the community as appropriate<br>a. Conducts visits and/or participates in events with partnerships as needed (i.e. School Visits)   |                            |                         |                         |                          |                      |
| 9. Actively promotes services, materials and agency/system activities<br>a. Prepares and maintains displays to promote materials and programs<br>b. Draws attention to programs and services (i.e. Ready to Read, specialist programs)  |                            |                         |                         |                          |                      |
| Strengths/Comments:   |                            |                         |                         |                          |                      |

\*Not all responsibilities apply to each individual. Note n/a if an item is not applicable to the individual being reviewed.

|  |                                   |                                |                                |                                 |                             |
|--|-----------------------------------|--------------------------------|--------------------------------|---------------------------------|-----------------------------|
| Development Goals (SMART):   |                                   |                                |                                |                                 |                             |
| <b>Policy/Procedure Adherence</b>  | <b>Does Not Meet Expectations</b> | <b>Meets Some Expectations</b> | <b>Meets Most Expectations</b> | <b>Fully Meets Expectations</b> | <b>Exceeds Expectations</b> |
| 1. Knows and understands agency and system policies and procedures<br>a. Can explain them clearly to customers and other staff<br>b. Seeks input from Manager when necessary |                                   |                                |                                |                                 |                             |
| 2. Enforces library policies and procedures in a nondiscriminatory way, and adapts flexibly to situations when appropriate   |                                   |                                |                                |                                 |                             |
| 3. Adheres to all staff policies including rules governing staff computer use and use of personal cell phones  |                                   |                                |                                |                                 |                             |
| Strengths/Comments:  |                                   |                                |                                |                                 |                             |
| Development Goals (SMART):   |                                   |                                |                                |                                 |                             |

|  |                                   |                                |                                |                                 |                             |
|--|-----------------------------------|--------------------------------|--------------------------------|---------------------------------|-----------------------------|
| <b>Technology</b>  | <b>Does Not Meet Expectations</b> | <b>Meets Some Expectations</b> | <b>Meets Most Expectations</b> | <b>Fully Meets Expectations</b> | <b>Exceeds Expectations</b> |
| 1. Shows willingness to learn new skills as technology is updated or replaced  |                                   |                                |                                |                                 |                             |
| 2. Successfully passes technology core competency evaluation(s)  |                                   |                                |                                |                                 |                             |
| 3. Demonstrates working knowledge of PCs and electronic resources and has the ability to instruct customers in their use |                                   |                                |                                |                                 |                             |
| Strengths/Comments:  |                                   |                                |                                |                                 |                             |
| Development Goals (SMART):   |                                   |                                |                                |                                 |                             |

\*Not all responsibilities apply to each individual. Note n/a if an item is not applicable to the individual being reviewed.

| <b>Teamwork</b>  | <b>Does Not Meet Expectations</b> | <b>Meets Some Expectations</b> | <b>Meets Most Expectations</b> | <b>Fully Meets Expectations</b> | <b>Exceeds Expectations</b> |
|--|-----------------------------------|--------------------------------|--------------------------------|---------------------------------|-----------------------------|
| 1. Gets along with others and can work as a part of a diverse group                                  |                                   |                                |                                |                                 |                             |
| 2. Actively contributes towards maintaining a positive work atmosphere                               |                                   |                                |                                |                                 |                             |
| 3. Willingly contributes to team tasks and the achievement of team goals                             |                                   |                                |                                |                                 |                             |
| 4. Demonstrates ability to accept input on work from others  |                                   |                                |                                |                                 |                             |
| 5. Follows through on assigned projects in a timely way, asks for help or guidance where appropriate |                                   |                                |                                |                                 |                             |
| Strengths/Comments:  |                                   |                                |                                |                                 |                             |
| Development Goals (SMART):   |                                   |                                |                                |                                 |                             |

| <b>Communication</b>   | <b>Does Not Meet Expectations</b> | <b>Meets Some Expectations</b> | <b>Meets Most Expectations</b> | <b>Fully Meets Expectations</b> | <b>Exceeds Expectations</b> |
|--|-----------------------------------|--------------------------------|--------------------------------|---------------------------------|-----------------------------|
| 1. Communicates clearly, honestly, and respectfully to others; maintains personal and professional boundaries at all times |                                   |                                |                                |                                 |                             |
| 2. Is considerate when relaying negative or critical information; resolves conflicts skillfully                            |                                   |                                |                                |                                 |                             |
| 3. Accurately conveys reliable information; spoken and written messages are clear and concise                              |                                   |                                |                                |                                 |                             |
| 4. Checks emails regularly and responds in a professional and timely manner  |                                   |                                |                                |                                 |                             |
| Strengths/Comments:  |                                   |                                |                                |                                 |                             |
| Development Goals (SMART):   |                                   |                                |                                |                                 |                             |

\*Not all responsibilities apply to each individual. Note n/a if an item is not applicable to the individual being reviewed.

| <b>Professionalism</b>  | <b>Does Not Meet Expectations</b> | <b>Meets Some Expectations</b> | <b>Meets Most Expectations</b> | <b>Fully Meets Expectations</b> | <b>Exceeds Expectations</b> |
|---|-----------------------------------|--------------------------------|--------------------------------|---------------------------------|-----------------------------|
| 1. Consistently follows directions and performs high quality work   |                                   |                                |                                |                                 |                             |
| 2. Maintains individual and shared workspaces in an orderly condition   |                                   |                                |                                |                                 |                             |
| 3. Adheres to appropriate standards of dress and behavior   |                                   |                                |                                |                                 |                             |
| 4. Completes timecard on or before the established deadline   |                                   |                                |                                |                                 |                             |
| 5. Reliably adheres to work schedule and provides advance notice for vacation, appointments, and personal leave |                                   |                                |                                |                                 |                             |
| 6. Reports to work on time and is ready for duty at the start of the scheduled shift                            |                                   |                                |                                |                                 |                             |
| 7. Attains the required type and number of annual training credits  |                                   |                                |                                |                                 |                             |
| 8. Demonstrates effective use of time and sound time management skills  |                                   |                                |                                |                                 |                             |
| Strengths/Comments:   |                                   |                                |                                |                                 |                             |
| Development Goals (SMART):  |                                   |                                |                                |                                 |                             |

| <b>Development/Continuous Learning</b>  | <b>Does Not Meet Expectations</b> | <b>Meets Some Expectations</b> | <b>Meets Most Expectations</b> | <b>Fully Meets Expectations</b> | <b>Exceeds Expectations</b> |
|---|-----------------------------------|--------------------------------|--------------------------------|---------------------------------|-----------------------------|
| 1. Keeps informed of current professional trends  |                                   |                                |                                |                                 |                             |
| 2. Participates in professional organizations and/or local community groups when applicable |                                   |                                |                                |                                 |                             |
| 3. Seeks opportunities to add to personal skill set and applies newly acquired skills       |                                   |                                |                                |                                 |                             |
| 4. Partners with manager to define and work towards career aspirations                      |                                   |                                |                                |                                 |                             |
| Strengths/Comments:   |                                   |                                |                                |                                 |                             |
| Development Goals (SMART):  |                                   |                                |                                |                                 |                             |

\*Not all responsibilities apply to each individual. Note n/a if an item is not applicable to the individual being reviewed.

\*Youth Services Coordinator Signature: \_\_\_\_\_

Date: \_\_\_\_\_

*\*When applicable*

Manager Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Employee Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**Rating Scale Definitions:**

| <b>Rating</b>                     | <b>Definition</b>   |
|-----------------------------------|---|
| <b>Does Not Meet Expectations</b> | Employee is not performing the required parts of the job proficiently. Improvement plan will be developed to increase the skills to an acceptable level.        |
| <b>Meets Some Expectations</b>    | Employee is performing the position proficiently some but not all of the time. SMART goals will be developed to increase the performance from some to most/all. |
| <b>Meets Most Expectations</b>    | Employee is performing most of the job duties proficiently most of the time. SMART goals will be created to assist the employee with further career mastery.    |
| <b>Fully Meets Expectations</b>   | Employee has reached master fluency. SMART goals might be developed to further strengthen this skill.   |
| <b>Exceeds Expectations</b>       | Employee is consistently delivering results beyond expectations/goals. SMART goals might be developed to teach and/or train others.                             |

\*Not all responsibilities apply to each individual. Note n/a if an item is not applicable to the individual being reviewed.



## Tips and Guidelines for Effective Peer Review

| <b>Consistency</b>  | <b>Professionalism</b>  | <b>Strengths</b>  | <b>SMART Goals</b>  | <b>Additional Comments from Peer</b> |
|---|---|---|---|--------------------------------------|
| Do the comments and ratings send a consistent message?  | Are there spelling or grammatical errors?                             | Have at least 2-3 strengths been provided?  | Do the goals follow the SMART goal format?  |                                      |
| Do the goals address areas where there are low ratings?   | Are comments written in a professional way that is free of judgement? | Do the comments provide information about the employees work or training (not just opinions)? | Do the goals include training, on-the-job skill development, and knowledge attainment? i.e. goals should not be accomplished by only attending a required training class. |                                      |
| Do the comments about strengths match the high ratings?   | Are comments written in the third person?                             |   |   |                                      |
| Is there rater bias, overrating or underrating based on likeability instead of job performance? | Do comments reflect personality traits or job performance?            |   |   |                                      |

**TLCPL – Sample SMART Goals** - Here are some examples of successful goals organized by type of employee.

**Circulation Clerk:**

- When communicating negative information, focus on what we can do for the customer and strive to deliver the information in an empathetic manner. Meet with your Supervisor once a month for the next 12 months to discuss instances when you've had difficult conversations with customers. During this 1-on-1 meeting, you may share what you did and brainstorm additional language, options, and outcomes to improve future customer experiences.
- When assigned tasks such as delivery, maintain focus on task without being distracted by other non-assigned duties. On a typical day, delivery should be unpacked, checked in, and shelved by 12:30pm. (Adjust day and time to specific expectation of supervisor). Check in with supervisor upon completion of task to determine success. Achieve and maintain expected pace by (insert date).

**Librarian:**

- Because of your interest in using Outcomes Based Planning and Evaluation in relation to program planning, please share your findings with the manager to be followed by presenting this information to the rest of the department at a staff meeting. This should be completed by June 2016.
- Librarian will re-familiarize and sharpen her skills regarding the meeting room and SmartBoard technologies and set-up, through using the available instructional sheets and through practice, by (*date*). Librarian will then check in with her manager, by (*2 weeks following that date*), to demonstrate her competency in these areas.

**Manager:**

- Develop agency SMART goals for 2016. Take into consideration the Agency Planning Template, the Strategic Plan and gather staff input, so that the goals are compatible with those of the organization. These goals should be different from individual staff goals and they should be goals that the group can work towards together. Develop three goals by May 31, 2016.
- Work on building trust with members of your staff. The goal is to build a climate of open and honest communication. Continue to hold check-ins with the librarians and the circulation supervisor using either the tools from Managing to Change the World or the HAT form from Manager Tools podcast. Also read four leadership books by December 2016. Two suggestions are Outstanding by J Miller and Leaders Eat Last by S Sineck. Report you progress to Branch Services in your bi-weekly check-ins.

## Developing SMART Goals

Paul J. Meyer describes the characteristics of S.M.A.R.T. goals in *Attitude is Everything*.

### Specific

The criterion stresses the need for a specific goal rather than a more general one. This means the goal is clear and unambiguous; without vagaries and platitudes. To make goals specific, they must tell a team exactly what is expected, why is it important, who's involved, where is it going to happen and which attributes are important.

A specific goal will usually answer the five "W" questions:

- What: What do I want to accomplish?
- Why: Specific reasons, purpose or benefits of accomplishing the goal.
- Who: Who is involved?
- Where: Identify a location.
- Which: Identify requirements and constraints.

### Measurable

The second criterion stresses the need for concrete criteria for measuring progress toward the attainment of the goal. The thought behind this is that if a goal is not measurable, it is not possible to know whether a team is making progress toward successful completion. Measuring progress is supposed to help a team stay on track, reach its target dates, and experience the exhilaration of achievement that spurs it on to continued effort required to reach the ultimate goal.

A measurable goal will usually answer questions such as:

- How much?
- How many?
- How will I know when it is accomplished?
- Indicators should be quantifiable

### Attainable

The third criterion stresses the importance of goals that are realistic and attainable. While an attainable goal may stretch a team in order to achieve it, the goal is not extreme. That is, the goals are neither out of reach nor below standard performance, as these may be considered meaningless. When you identify goals that are most important to you, you begin to figure out ways you can make them come true. You develop the attitudes, abilities, skills, and financial capacity to reach them. The theory states that an attainable goal may cause goal-setters to identify previously overlooked opportunities to bring themselves closer to the achievement of their goals.

An attainable goal will usually answer the question:

- How: How can the goal be accomplished?

## Developing SMART Goals

### Relevant

The fourth criterion stresses the importance of choosing goals that matter. A bank manager's goal to "Make 50 peanut butter and jelly sandwiches by 2:00pm" may be specific, measurable, attainable, and time-bound, but lacks relevance. Many times you will need support to accomplish a goal: resources, a champion voice, someone to knock down obstacles. Goals that are relevant to your boss, your team, your organization will receive that needed support.

Relevant goals (when met) drive the team, department, and organization forward. A goal that supports or is in alignment with other goals would be considered a relevant goal.

A relevant goal can answer yes to these questions:

- Does this seem worthwhile?
- Is this the right time?
- Does this match our other efforts/needs?
- Are you the right person?
- Is it applicable in current socio- economic- technical environment?

### Time-bound

The fifth criterion stresses the importance of grounding goals within a time frame, giving them a target date. A commitment to a deadline helps a team focus their efforts on completion of the goal on or before the due date. This part of the SMART goal criteria is intended to prevent goals from being overtaken by the day-to-day crises that invariably arise in an organization. A time-bound goal is intended to establish a sense of urgency.

A time-bound goal will usually answer the question:

- When?
- What can I do six months from now?
- What can I do six weeks from now?
- What can I do today?

## TLCPL Evaluation Process

1. Employee provides completed input sheet to manager
2. Manager then:
  - Has aspirational conversation with employee, identify goals
  - Completes evaluation grid, collecting input where necessary
  - Submits form and goals to appropriate administrator for review
3. Employee and manager meet for evaluation discussion
  - Document will be printed AND remain open for editing on the computer to reflect any changes resulting from conversation
  - Employee and manager come to agreement on 3 – 5 goals for the year
  - Finalized document is printed and signed by both
  - Manager inputs goals into calendar for updates/review according to agreed-upon schedule
  - Evaluation is submitted to HR
  - Employee may add a response or request review from HR

### Grid descriptions:

**Does Not Meet Expectations** – employee is not performing the required parts of the job proficiently. Improvement plan will be developed to increase the skills to an acceptable level.

**Meets Some Expectations** -- employee is performing the required parts of the job proficiently some, but not all of the time. SMART goals will be developed to increase the performance level from some to most/all of the time.

**Meets Most Expectations** – employee is performing most job duties proficiently most of the time. SMART goals will be created to assist the employee with further career mastery.

**Fully Meets Expectations** – employee has reached mastery/fluency, and results clearly meet goals. SMART goals might be developed to further strengthen skills.

**Exceeds Expectations** – employee is consistently delivering results beyond expectations/goals. SMART goals might be developed to teach and/or train others.

|  |                            |
|--|----------------------------|
|  | Does Not Meet Expectations |
|  | Meets Some Expectations    |
|  | Meets Most Expectations    |
|  | Fully Meets Expectations   |
|  | Exceeds Expectations       |