A tour of the process and some tips

Overview

Performance Evaluation
Our mission today

Why annual performance evaluation?
What is part of the evaluation?
UF process
Where are you headed? – Goals
Evaluation best practices and building teams – Tips
INTRODUCTIONS

HELLO

your NAME
where you WORK
Why is evaluation important?

• What am I doing well?
• How can I improve?
• What are the
  • skills,
  • knowledge, and
  • behaviors I need to be successful?
• Two way conversation
• ......
Are you too busy to improve?

No thanks!

We are too busy

STOP
Listen
Learn
What am I evaluated on?

1. Job performance
   - Skills
   - Knowledge

2. Work-related behavior

Competencies
What am I evaluated on?

1. Job performance includes:
   - Position Description
   - Goals from last year
   - Additional endeavors? Initiatives?
What am I evaluated on?

- Observable behaviors
- Teamwork
- Communication – Interpersonal Skills

2 Work-related behavior
UF Process
Annual Evaluation – March 1 – February 28

due March 27
Performance Evaluation Steps

1) Self assessment
To supervisor

2) Supervisor evaluation
2nd level supervisor review

3) Share with employee
Meet with employee

4) Finalize evaluation
Submit to employee
Submit to Libraries HR by March 27th
UF provides two USPS and TEAMS evaluation formats

The Form –
For All USPS and hourly TEAMS employees

The Cover Sheet & Letter
For TEAMS exempt employees
UF provides two USPS and TEAMS evaluation formats

### The Form –
For All USPS and hourly TEAMS employees

**UF** provides two USPS and TEAMS evaluation formats

**BOTH**

- Available as writable Word document
- Libraries require 2nd level supervisor signature
- Strongly encourage employee self assessment
- Top section information provided by HR
- Include a statement about conflict of interest
- Require overall rating

### The Cover Sheet & Letter -
For TEAMS exempt employees
All USPS and TEAMS non-exempt

Performance Appraisal Form for TEAMS Non-Exempt, USPS Non-Exempt and USPS Exempt

Name: ____________________________  
Title: ______________________________  
Position #: _________________________  
UF ID: ______________________________ 
FTE: _______________________________ 
Job Code: ____________________________

Appraisal Type: Check one  
Annual  
Probationary  
Special  

Appraisal Period: ____________________

PART A: Employee Self Assessment  
To be completed by employee and returned to supervisor prior to appraisal meeting.

Work Performance (Briefly list your main duties and accomplishments during the appraisal period.)  

Attendance/Reliability (Describe your attendance during the appraisal period.)  

Customer Service  

Initiative/Productivity (List important accomplishments during the appraisal period.)  

Teamwork & Interpersonal Skills  

Goals for the next appraisal year  

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Annual appraisals must be issued to, signed, and dated by employees no later than March 31. Forms should be mailed or delivered to Human Resources Services.  
Attn: Kathy Higgins, Employee Relations, PO Box 110281, Campus. Phone: (352) 392-2477.
Performance Categories

- Work Performance
- Customer Service
- Attendence and Reliability
- Initiative and Productivity
- Teamwork and Interpersonal Skills
Work Performance

What types of things might you evaluate or be evaluated on in this category?

• The skills
• The knowledge
• The abilities
• How the job is performed
• The nuts and bolts of the job
Attendance and Reliability

What types of things might you evaluate or be evaluated on in this category?

- Attendance
- Task completion
- Follow through
- Accuracy in work product
Customer Service

What types of things might you evaluate or be evaluated on in this category?

• Assistance
• Presentation/Demeanor
• Communication/Respect
• Service
• Phone manner
• Electronic communication
What types of things might you evaluate or be evaluated on in this category?

- Motivation
- Organizational skills
- Vision
- Work volume
- Work accuracy
Teamwork and Interpersonal Skills

What types of things might you evaluate or be evaluated on in this category?

- Cooperation
- Collaboration
- Flexibility
- Consensus
- Supportive
- Communication

You cannot be effective without teamwork and interpersonal skills
Performance Category Ratings

Rate Each Performance Category

Exceeds: 5
Above Average: 4
Achieves: 3
Minimally Achieves: 2
Below: 1
Overall Ratings

- **Exceeds**: 25-24
- **Above Average**: 23-20
- **Achieves**: 19-15
- **Minimally Achieves**: 14-10
- **Below**: 9-5

Contact Libraries HR
Performance Appraisal form for TEAMS Exempt Employees

**Employee’s name:** Click here to enter text.  
**UF ID:** Click here to enter text.  
**Job Title:** Click here to enter text.  
**Appraisal Period:** Click here to enter text.  
**Department:** Click here to enter text.  
**Overall rating:** Choose an item here.

Prior to completing the appraisal, it is recommended that the employee submit a self-assessment.  

Please attach a narrative to this form providing a detailed evaluation of the employee’s performance in areas such as productivity, initiative, leadership, dependability, reliability, customer service, teamwork, interpersonal skills, supervisory skills or other appropriate areas of responsibility. Goals should also be set for the next appraisal year.  

An overall rating based on the rating categories listed below, must be entered on this form. The overall rating should be consistent with the evaluative comments on the narrative. Please contact your Employee Relations Satellite office prior to issuing an overall rating of “Minimally Achieves” or “Below”.

<table>
<thead>
<tr>
<th>Exceeds:</th>
<th>Almost always exceeds performance standards. Consistently produces excellent quality work, is innovative, and demonstrates high level leadership qualities.</th>
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<td>Above Average:</td>
<td>Consistently meets and regularly exceeds performance standards. Able to work independently.</td>
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<tr>
<td>Achieves:</td>
<td>Generally meets performance standards. Seldom excels or falls short of desired results. Able to work independently, but sometimes requires direction.</td>
</tr>
<tr>
<td>Minimally Achieves:</td>
<td>Frequently fails to meet performance standards. Requires frequent instruction and supervision.</td>
</tr>
<tr>
<td>Below Performance Standards:</td>
<td>Fails to meet performance standards.</td>
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**Employee’s Acknowledgment of Review and Receipt:**  
By signing below, I acknowledge that my evaluation has been reviewed with me and I have received a copy. I understand that my signature does not necessarily indicate my agreement with the evaluation. Also, I understand that I may submit written comments/rebuttal on any aspect of the performance appraisal, and that a copy of the comments will be provided to my supervisor as well as Human Resource Services for inclusion in my official personnel file. Written comments should be submitted to Human Resource Services within ten (10) working days of receipt of appraisal.  

An employee may not engage in any outside activity that interferes with the full performance of professional responsibilities or other institutional obligations in keeping with UF Regulation GC1:1-011, which governs disclosure of outside activities and financial interests. Please check applicable box (as of this date):

- [ ] 1) I have no outside activities to report
- [ ] 2) I have submitted a Disclosure of Outside Activities and Financial Interests (Form OAA-GAL-267*) to the chair/supervisor or dean/director
- [ ] 3) My Disclosure of Outside Activities and Financial Interests (Form OAA-GAL-267*) is attached.

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**Employee’s Signature**  
**Date**

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**Supervisor’s Name & UF ID (please print)**  
**Supervisor’s Signature**  
**Date**

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Phone: (352) 392-2477.
TEAMS Exempt employees should be evaluated on their Leadership and Supervisory Skills (if applicable) as well as the 5 performance categories and other appropriate areas of responsibility.
Writing the letter

1. Use Performance Categories ++
2. Use Position Description
3. Don’t forget past and future Goals

Give an Overall Rating on Cover Sheet
Best practices for creating a Learning Organization with a culture that strengthens collaborative initiatives.

Best Practices
review of last year is important but well written GOALS help predict future success

**GOALS**

‘a goal without a plan is just a wish’
Based on the position description

Outline objectives and specific activities

Discussed
Types of Goals

• Performance Goals
  What you are working to accomplish

• Development Goals
  Areas you want to develop in order to grow in your job
Collaborate with other circulation supervisors to design an online guide for student assistants. This is to improve the time it takes to train them and make it more consistent across the libraries. The guide will include links to key documents and other resources and will be available for fall 2017 incoming student assistants.
To increase my effectiveness in running meetings I will prepare an agenda for our departmental meetings and present one topic through December. I will participate in the ‘Making Meetings Work’ training offered by UF TOD by the end of October. Beginning in January I will lead the meetings with backup from my department head. In my weekly meetings with my supervisor we will discuss my effectiveness.
Tips for writing goals

• Don’t wait for your supervisor to suggest writing goals. Write 3 – 4 goals.

• Discuss each goal with supervisor

• Understand how they relate to the goals of the department/why they matter
Ask yourself:

• What results will you produce?
• What will be different in your department or the libraries?
• What will you do and when will you do it?
• How will you know you’ve made progress?
SMART GOALS

GOALS SHOULD BE
SPECIFIC
MEASURABLE
ATTAINABLE
RELEVANT
TIMELY
### SMART GOALS

**Performance Goals must be:**

<table>
<thead>
<tr>
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<th>Specific &amp; Strategic</th>
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<tr>
<td><strong>S</strong></td>
<td>Outline exactly what you hope to accomplish and what the impact will be.</td>
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<td>Attainable; not so lofty that you can’t achieve them and not so simple that you won’t be challenged.</td>
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<td><strong>T</strong></td>
<td>Need to have clear time frames attached to them.</td>
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Develop 3 new trainings

[that respond to training gaps in the competencies training matrix]

- One training on improving presentation skills, one on emergency procedures and one on customer service

- Trainings delivered in April, August and January
Collaborate with other circulation supervisors to design an online guide for student assistants

[to improve the time it takes to train them and make it more consistent throughout the Libraries]

- The guide should include links to key documents and other resources.
- And should be available for Fall 2017 incoming student assistants.
## SMART GOALS

### Performance Goals must be:

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The objectives must be relevant to the level at which the individual is at in his/her career, to the priorities and workload of the specific department. |
| **T** | **Timely**  
Need to have clear time frames attached to them. |
Creating a Learning Organization with a culture that strengthens collaborative initiatives takes skills and practice.

For Supervisors
Considerations

• Review position description (update it!)
• Review prior year’s goals and comment on whether or not they were accomplished
• Review employee’s goals for coming year if provided
Considerations

- **Have a conversation**
- Consider training needs
- Consider departmental goals
- Refer to the Libraries Strategic Directions
- Consult the Competencies Training Matrix
  [https://www.uflib.ufl.edu/competencies/](https://www.uflib.ufl.edu/competencies/)
Think about it...

Employees want to work for people who have their back – the more real and authentic you are the more you build your relationship and your team.
Think about it...

To **build rapport** you need to express a real interest in the team and the individual employee’s contributions to the work of the Libraries

- Spend time preparing
- Read the self evaluation
- Be thoughtful in your delivery
- **Create dialogue**
During the evaluation meeting:

• Biggest mistake is when the manager does all the talking

• Do NOT read the appraisal during the evaluation session – this is supposed to be a conversation
Think about it...

Specificity builds trust and dialogue

Vague, not so much

We need to build teams!
Think about it...

“Good job” and “You’re not a team player” aren’t feedback.

Be specific.
No example. No feedback.

Want people to replicate or change a behavior? Give real feedback.

Credit: Sheri Harley of “Candid Culture”
Think about it...

As a manager it is your job to become an expert at building a team.
What specific feedback could you give your employees that would make them feel part of the team and informed about what they are doing well?
Building Teams

https://www.ted.com/talks/margaret_heffernan_why_its_time_to_forget_the_pecking_order_at_work?language=en#t-4882
Building Teams

Reading the Mind in the Eyes test – social intelligence test

https://www.questionwritertracker.com/quiz/61/Z4MK3TKB.html

“The ability to read the emotions of others is linked to "social intelligence" which, in turn, is linked to performance on team-based problem solving tasks.”
Building productive teams requires a level of emotional intelligence that demonstrates your ability to manage your own emotions and react appropriately to the emotions of others.

Self Awareness
Self Management
Social Awareness
Relational Management
I encourage you to continue to work to build a genuine team

https://www.ted.com/talks/margaret_heffernan_why_it_s_time_to_forget_the_pecking_order_at_work?language=en#t-4882
Building Teams

Start with Emotional Intelligence: The social skills you need to be productive in a team environment

Include some thinking on Implicit Bias – becoming aware of unconscious biases you may have

Talk with your team about these. Open a discussion.

Take steps to become more of a team builder and motivate your team.

Reading the Mind in the Eyes test.参
Participate here: [https://www.questionwrite rtracker.com/quiz/61/Z4MK3TKB.html](https://www.questionwrite rtracker.com/quiz/61/Z4MK3TKB.html)

Implicit Social Cognition – The gap between intentions and actions.参
Participate here: [https://www.projectimplicit.net/index.html](https://www.projectimplicit.net/index.html)

7 Ways Managers Motivate and Demotivate Employees:参
Have we missed anything?
What is your ‘take away’?
Thank You