

THE INS AND OUTS OF PERFORMANCE EVALUATIONS

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Description: Do you dread doing your staff's performance evaluations? Want to come up with an easy, objective method for measuring past performance and establishing future goals? Come hear how...

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Definition:

“Performance evaluations are intended to measure the extent to which the employee's performance meets the requirements of a particular position and to establish goals for the future; strengthen

the relationship between you and the employee; open up channels of communication; appraise past performance; recognize good performance; identify areas that might require improvement; enable you to assess your own communication and supervisory skills.”

1) The Basics: Considerations

The key ingredients in a successful evaluation are: identifying job standards; being consistent in measuring and communicating the extent to which those standards are being met; and providing opportunities for feedback and clarification.

- a. “Holiday Inn” approach: “no surprises”
 - i. Performance evaluation is NOT the time to ‘drop a bombshell’ on an employee. This is a time to expound and clarify issues and assess performance in greater depth—not for any major surprises, if it can be avoided.
- b. Private site
 - i. To best facilitate an open, and honest discussion/meeting the evaluation should be performed in a private office or room, without risk of being overheard by other employees.
- c. Evaluate performance, not personality
 - i. focus on the performance, by citing specific examples, to avoid ambiguity and arguments (e.g., on Monday August 23rd last year, I observed that you...” as opposed to “I feel that your attitude is lacking”)
 - ii. documenting incidents will help in the event you need to discipline and/or fire an employee—particularly if the case goes to court/arbitration
 - iii. seek input from supervisory staff
 1. If you are not the employee’s day-to-day supervisor, seek input from that individual
- d. Encourage subordinate to talk / Listen to your employee
 - i. use this opportunity to solicit feedback on his/her level of satisfaction, ongoing issues, future plans, etc.
 1. Example: Ask employee if they are enjoying their job—why or why not? Are there other areas they’d like to explore?
 - ii. tackle problems together (e.g., if employee is dissatisfied, supervisor could discuss options, including job or career change)

- e. Be specific in both documentation and comments
 - i. related to “c” above—document specific incidents and examples of both positive and negative performance as well as expectations—which can be measured (e.g., will reshelve library materials within 24 hours of their being checked-in; will claim missing journal issues within 48 hours of notification)
- f. Handling grievances
 - i. listen and document
 - a. reserve the right to respond at later date
 - i. consider having another supervisor/human resources dept member present to “witness” the proceedings and/or to provide support
 - b. be sure to address the source of the problem and try to resolve it to yours-employees mutual satisfaction
 - c. consult employee handbook/human resources department

2) Areas of Evaluation

The evaluation areas are intended to document performance and serve as guidelines for discussion. The discussion of performance should foster two-way communication between you and the employee. The appraisal document also becomes a record of that evaluation discussion for future reference.

Note: some suggest having *both* employee and supervisor complete the sections, below, and then meet to discuss.

- a. Performance based upon job description
 - i. assumes existence of job description and/or knowledge of expectations
- b. Customer service
 - i. is he she polite/professional/helpful?
 - ii. even technical service librarians occasionally communicate with public, vendors, etc.
- c. Enforcement of library policies and procedures
 - i. are they consistent? how do they handle exceptions?
- d. Fulfillment of stated goals for previous year
 - i. measured based upon stated goals from previous year
- e. Evidence of continuing education
 - i. assumes opportunities are available throughout the year
- f. Work relationships with other library and institute staff
 - i. are they helpful, courteous, collegial?
- g. Areas in need of improvement
 - i. work-related, interpersonal, goal-related, etc.
- h. Goals for coming year
 - i. seek input from employee; make them practical and job/career related
- i. Comments
 - i. anything not covered by the above, and/or opportunity to stress something of significance
- j. Employee signature
 - i. evidence that employee has seen and reviewed document

3) Salary issues

- k. raise pool vs. merit increase
- l. fulfillment of previous year's goals

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