

## Employee Evaluations for Public Library Staff

The following information was collected by Sue Keefer, Library Director, Las Animas-Bent County Library District, regarding an inquiry posted to libnet pertaining to Employee Evaluations.

The question posted to libnet was:

*“Would anyone be willing to share their employee performance evaluation form with me? I don't want anything real complicated, but the one we have is a generic one from the courthouse. I'd like one that addresses specific library duties. I've got a good director evaluation, and we're a small library so I don't want anything tailored to department heads and that sort of thing.”*

Several public libraries responded with examples of evaluations currently being used at their respective libraries. The evaluations submitted are included in this document and listed as follows:

1. Basalt Regional Library District Performance Review
2. Park County Public Libraries Annual Performance Evaluation
3. Staff Evaluation and Developmental Plan
4. Performance Review for Combined Community Library Assistant
5. Employment Performance Appraisal Interlibrary Loan/Reference Technician
6. Employment Performance Appraisal Library Cataloger/Reference
7. Employment Performance Appraisal Library Clerk II, part-time
8. Employee Performance Review
9. Performance Appraisal
10. Goal Planning sheet
11. Performance Appraisal Self-Assessment
12. Job Oriented Dimension Values
13. Temporary Employee Appraisal Review

**BASALT REGIONAL LIBRARY DISTRICT  
PERFORMANCE REVIEW**



**OBJECTIVES OF THE PERFORMANCE REVIEW**

**Focus communication on individual job performance**

**Identify and reinforce areas of high achievement and/or areas that require improvement**

**Identify future goals and developmental opportunities**

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**EMPLOYEE NAME:** \_\_\_\_\_

**SUPERVISOR:** \_\_\_\_\_

**POSITION:** \_\_\_\_\_

**PERSON CONDUCTING REVIEW:** \_\_\_\_\_

**PERFORMANCE PERIOD:** From \_\_\_\_\_ To \_\_\_\_\_

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**RATING SCALE:**

**NI – NEEDS IMPROVEMENT (1)**

**M – MEETS EXPECTATIONS (2)**

**E – EXCEEDS EXPECTATIONS (3)**

**AREAS OF REVIEW**

**SKILLS**

**A. GENERAL POSITION ASSESSMENT**

Understands the information and responsibilities pertinent to the job and demonstrates necessary expertise, business awareness and knowledge of technology. Continues to learn, expand knowledge and apply creativity to seek solutions. Makes appropriate decisions.

**NI    M    E**

Comments:

**B. COMMUNICATION SKILLS**

Listens well. Articulates well. Displays computer, writing, and public interaction skills as required for the job. Comprehends and understands information and explanations. Keeps others informed. Shares information.

**NI    M    E**

Comments:

**C. INTERPERSONAL SKILLS AND PROFESSIONALISM**

Cooperates with peers, supervisor, and is a productive team member. Shows a high level of professionalism in person, in email, on the telephone, in language, and in dress. Exhibits flexibility, initiative and self-direction. Maintains a positive and respectful attitude. Shows enthusiasm about work. Accepts feedback well. Demonstrates loyalty and commitment.

**NI    M    E**

Comments:

**D. ORGANIZATIONAL SKILLS AND PRODUCTIVITY**

Plans, delegates, and prioritizes work effectively. Coordinates, prepares, and presents projects well and follows through with assignments. Produces quality work and a satisfactory quantity of work. Delivers on time and within budget. Meets deadlines.

**NI    M    E**

Comments:

**E. MANAGEMENT AND LEADERSHIP SKILLS**

Manages own area of responsibility without regularly intruding upon the scheduled time of other staff members. Understands the goals and needs of the library and its staff as a whole. Is counted a positive benefit to the staff by others on staff. Gains the respect and trust of fellow staff members. Inspires achievement in others. Sets a good example. Cooperates and contributes to the management team and overall wellbeing of the Basalt Regional Library.

NI M E

Comments:

**PERFORMANCE ANALYSIS AND DISCUSSION**

F. Discuss and evaluate the employee's job performance. Base your evaluation upon the position requirements, achievement of the goals established during the past year, and your assessment of the employee's accomplishments.

NI M E

Comments:

G. Are there areas of exceptional performance that should be particularly noted? Provide specific examples.

NI M E

Comments:

H. Are there areas of performance needing more attention or improvement? Provide specific examples.

NI M E

Comments:

I. State and discuss the expectations and goals for the upcoming review period. Give examples of how these goals can be met (e.g., training).

NI M E

Comments:

J. Employee works as part of a team.

NI M E

Comments:

**SCORING**

Total number of each rating on the scale:

NI \_\_\_\_\_ x 1 = \_\_\_\_\_

M \_\_\_\_\_ x 2 = \_\_\_\_\_

E \_\_\_\_\_ x 3 = \_\_\_\_\_

Total \_\_\_\_\_ Divide by 9 = \_\_\_\_\_

Overall Performance Score: \_\_\_\_\_

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**PROFESSIONAL DEVELOPMENT PLAN**

List specific activities the employee will do in the next twelve months as part of his/her professional development.

**RECOMMENDATIONS**

Reviewer's Comments

Employee's New Compensation: \$ \_\_\_\_\_, an increase of \_\_\_\_\_%.

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

**Employee:**

I have read this review. \_\_\_\_\_ (initial)

This review has been discussed with me. \_\_\_\_\_ (initial)

\_\_\_\_\_ I agree

\_\_\_\_\_ I disagree

Employee's Comments (optional):

\_\_\_\_\_

Employee's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Director's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Follow up review scheduled \_\_\_\_\_ months from date of this review.

**Basalt Regional Library District  
Annual Goal Setting Document**

**Employee** \_\_\_\_\_

**Date** \_\_\_\_\_

**Employee's review of previous year:  
Accomplishments**

**Goals for the coming year:**

**Employee's comments:**

**Director's comments:**

\_\_\_\_\_  
**Employee's Signature**

\_\_\_\_\_  
**Director's Signature**



# Park County Public Libraries

## ANNUAL PERFORMANCE EVALUATION

Name: \_\_\_\_\_ Position: \_\_\_\_\_

Department: Library Location: \_\_\_\_\_

Date of Hire: \_\_\_\_\_ Appraisal Date: \_\_\_\_\_

### Purpose and Instructions:

Our mission: The mission of the Park County Public Libraries is to serve the community by providing lifelong learning, information, entertainment, and recreational opportunities. In support of this mission, the overall goal of the county libraries is to achieve a high level of patron satisfaction. Employees are an integral part of achieving this goal. This appraisal should provide feedback to employees on their contribution in support of our mission. The appraisal will also provide employees with constructive comment regarding development needs. The appraisal will provide the employees with specific examples of their strengths or weaknesses.

Using the rating guidelines, use a mark (x) to rate each appraisal factor based upon specific work examples and data, if applicable and available. If a particular appraisal factor does not apply based on the requirements of the position, mark (x) the NOT APPLICABLE rating.

Ratings:

**Outstanding** – Performance consistently and significantly exceeds objectives with respect to this factor.

**Superior** – Performance often exceeds objectives with respect to this factor.

**Solid Performer** – Consistently meets objectives with respect to this factor.

**Needs Improvement** – Sometimes or often fails to meet objectives with respect to this factor.

**Not Applicable** – This factor does not apply based on the requirements of the position.

### PART I

#### JOB RELATED SKILLS AND KNOWLEDGE

This section is to evaluate how well the employee demonstrates an understanding of the job procedures, methods, processes, skills, equipment and materials required to perform the job. Use the comment section to provide specific examples of the employee's strengths or weaknesses or for other appropriate comments.

1. **Patron Services** – Manages patron interactions in a polite and professional manner. Is proactive, goes “above and beyond” to support to provide excellent patron service. Often anticipates what the patron might need, then asks permission to take care of the additional need where appropriate. Exhibits effective and positive communication skills.

\_\_\_\_ Outstanding  
\_\_\_\_ Superior  
\_\_\_\_ Solid Performer  
\_\_\_\_ Needs Improvement

Comments: \_\_\_\_\_

2. **Job Knowledge** – Proficient in skills, methods, and knowledge required for position. Keeps abreast of current developments in field. Utilizes available technology effectively and efficiently.

Outstanding  
 Superior  
 Solid Performer  
 Needs Improvement

Comments: \_\_\_\_\_

3. **Productivity/Quantity of Work Produced** – Produces acceptable or above results in a timely manner. The volume of work produced is acceptable compared to expected results.

Outstanding  
 Superior  
 Solid Performer  
 Needs Improvement

Comments: \_\_\_\_\_

4. **Quality of Work Produced** – The employee's work is accurate, neat, and thorough. Tasks are performed to completion and errors are minimal. Employee's work and behavior exhibits commitment to the Library's mission, vision, and goals.

Outstanding  
 Superior  
 Solid Performer  
 Needs Improvement

Comments: \_\_\_\_\_

5. **Working Relationships** – The employee interacts effectively with managers, coworkers, and internal customers. The employee acts as a team player in terms of cooperative spirit. Exhibits effective and positive communication skills.

Outstanding  
 Superior  
 Solid Performer  
 Needs Improvement

Comments: \_\_\_\_\_

6. **Reliability** - Dependable. Can be counted on to work as needed to achieve results and/or meet targets within established time frames. Employee complies with the District's absence and lateness policy.

Outstanding  
 Superior  
 Solid Performer  
 Needs Improvement

Comments: \_\_\_\_\_

7. **Problem Solving and Decision Making** – Anticipates and identifies problems. Uses logic and sound judgment to solve problems and make decisions.

Outstanding  
 Superior  
 Solid Performer  
 Needs Improvement

Comments: \_\_\_\_\_

8. **Adaptability** – Employee is able to adjust to a variety of situations, maintains flexibility.

Outstanding  
 Superior  
 Solid Performer  
 Needs Improvement

Comments: \_\_\_\_\_

9. **Leadership Skills** – When appropriate and necessary, provides a balance of support and guidance to others.

Outstanding  
 Superior  
 Solid Performer  
 Needs Improvement

Comments: \_\_\_\_\_

## PART II Work Habits

1. **Attendance or tardiness** - Attitude toward all types of attendance and leave.

Excellent attendance and punctuality; never abuses leave privileges  
 Very good attendance; requires no overseeing of leave privilege  
 Average attendance; sometimes late or absent  
 Needs improvement

Comments: \_\_\_\_\_

2. **Communication** - The effectiveness in communicating with others, including co-workers, superiors, or the public, using both verbal and written skills necessary for the job.

Outstanding performance  
 Exceeds standard requirements of the job  
 Meets standard requirements of the job  
 Needs improvement

Comments: \_\_\_\_\_

3. **Record-keeping** - The employee's organization, neatness, and timeliness of the required paperwork including timesheets, daily statistics, ILL requests, etc.

- Outstanding performance  
 Exceeds standard requirements of the job  
 Meets standard requirements of the job  
 Needs improvement

Comments: \_\_\_\_\_

**PART III**

**OVERALL PERFORMANCE RATING**

	Outstanding	Superior	Solid Performer	Needs Improvement
Patron Services				
Job Knowledge				
Productivity/Quantity of Work				
Quality of Work				
Working Relationships				
Reliability				
Problem Solving				
Adaptability				
Leadership Skills				
Attendance/Tardiness				
Communication				
Record Keeping				

Outstanding\_\_\_\_ Superior\_\_\_\_ Solid Performer\_\_\_\_\_ Needs Improvement

**PART IV  
SUMMARY OF STRENGTHS AND AREAS FOR IMPROVEMENT**

1. **Strengths** (Comment on the strongest performance assets; areas where potential or future growth is indicated):

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

2. **Accomplishments** (Comment on the progress made toward reaching past improvement goals):

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

3. **Areas for improvement** (List specific goals agreed upon for accomplishment before the next evaluation):

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**PART V  
ACKNOWLEDGMENT AND SIGNATURES**

Rated by: \_\_\_\_\_ Approved by: \_\_\_\_\_

I have reviewed this evaluation and have discussed the contents with my supervisor/manger. My signature indicates that I have been advised of my performance and does not necessarily imply my agreement. I completely understand its contents.

\_\_\_\_\_  
Employee signature

\_\_\_\_\_  
Date

# Staff Evaluation and Developmental Plan

It is the goal of this library to advance intellectual curiosity, promote lifelong learning and provide an environment in which minds can grow. This library supports an active, informed community by providing access to materials in various formats representing diverse points of view. The staff wisely manages the financial resources while offering quality materials, current technology, helpful service, and promises to encourage a love of reading in the community.

## Current Review Period - Goals

List 3-5 goals for your work in the coming year. You may use a phrase or paraphrase from the library's goal statement above or Code of Service [on last page] for your statements, Describe the **measurable** steps (at least 2 per goal [A. & B.]) you will take to attain each of your goals.

1.

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A.

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B.

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2.

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A.

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B.

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3

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A.

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Briefly describe any frustrations or concerns that you have experienced since your last evaluation, [including 2005 goals not met].

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Any other comments?

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Thank you!

### Code of Service

Library patrons of all ages will find easily **accessible** library materials in a clean, safe, **organized** environment staffed with **courteous** people.

All visitors, whether in person, on the phone or through the Internet, will be welcomed, **graciously** and **impartially**, without discrimination.

**Prompt**, helpful **service** to the public will take precedence over the library staff's internal assignments and interpersonal communications.

All information shared with library patrons will be based on **reliable**, current resources, and delivered in an **appropriate** manner.

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Staff Signature

(Signifies that I have a copy of the enclosed material but may or may not indicate agreement.)

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Date

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Signature of Director

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Date

(Signifies that I have had the opportunity to read & discuss the enclosed.)

### Goals set by the Administration

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- ✚ All staff will strive to increase the use of the library's materials, equipment and the facility. **Encourage circulation, computer use, in-house use, and meeting room reservations.**
- ✚ All staff will willingly provide access and guidance to materials both in-house and worldwide, utilizing both print and non-print technology, tactfully assisting inexperienced patrons while encouraging them to become self-sufficient. **Help 4-6 patrons per month with technology, e-mail, etc.**
- ✚ All staff will endorse patron and staff confidentiality, library policies and procedures. **Refrain from discussing either patron's or staff info. Become familiar with policies and stay current on procedures.**
- ✚ All staff will be both efficient and friendly; never placing a value judgment on questions or requests. **Prioritize your work, putting all patrons' needs first.**
- ✚ All staff will treat coworkers with respect; look for each other's strengths and cultivate them, assisting when appropriate. **Empower the staff to make decisions, support each other and the library's mission.**
- ✚ All staff will try the current way of completing a task before seeking a shortcut - but remain open-minded and ready to try new methods. **(New Patron notebook, Summer Reading, after school Programs, etc.)**
- ✚ All staff will communicate with finesse and the best of intentions (avoiding gossip or negativity). **Will not only avoid, but discourage gossip and negativity.**
- ✚ All staff will exhibit loyalty to the organization, each other and library peers, effectively discouraging inappropriate discussions when necessary. **Support and endorse all library staff in Colo.**
- ✚ All staff will actively work to improve their knowledge of the collection, and admit uncertainty when unable to ensure accurate answers. **Will work hard to improve the collection, become familiar with it, utilize it, check the Internet and yet be prepared to admit failure if info is not available to us!**
- ✚ Reader's Advisory
  - **Bulletin boards**
  - **Book displays including books on the front shelves.**

**Performance Review for Combined Community Library Assistant**

Library Assistant: \_\_\_\_\_ Date \_\_\_\_\_

Library Media Director (evaluator) \_\_\_\_\_

Evaluation Period: \_\_\_\_\_

Rate performance 1 to 5

5=Outstanding 4=Very good 3=Fully qualified 2=Needs improvement 1=Marginal

**Job Knowledge:**

Library policies	_____	Use of computers/equipment	_____
Follett software programs	_____	Shelf reading/shelving	_____
Patron database programs	_____	Cash handling	_____
Statistic/records maintenance	_____	Circulation desk skills	_____
Reference skills	_____	Library procedures	_____

**Work Methods:**

Quality of work	_____	Timeliness	_____
Completeness	_____	Accuracy	_____
Attention to detail	_____	Neatness	_____
Safety practice	_____	Helpfulness	_____

**Work Behaviors:**

Customer service	_____	Employee relationships	_____
Job Commitment	_____	Initiative & creativity	_____
Reliability	_____	Leadership/management	_____
Public relations	_____	Library cooperation	_____

**Action Plan:**

**Staff Comment Section:**

Signatures attest to agreement that the evaluator has discussed this performance assessment with the library assistant. It does not necessarily designate agreement or disagreement with all comments or evaluations made.

Library Assistant Signature: \_\_\_\_\_ Date \_\_\_\_\_

Library Media Director Signature: \_\_\_\_\_ Date \_\_\_\_\_



EMPLOYMENT PERFORMANCE APPRAISAL		U N S A T I S F A C T O R Y	I M P V M E N T  N E E D E D	A V E R A G E	E X C E L L E N T	O U T S T A N D I N G
EMPLOYEE:		1	2	3	4	5
POSITION: Interlibrary Loan/Reference Technician						
REPORTING PERIOD COVERED:						
DATE:						
TASK WT.	TASK NO.	TASK DESCRIPTION				

4	1.	Searches state and national databases for books, photocopies, videos, and microfilm that are requested by patrons but not owned by the Cortez Library. Translates subject requests into requests for books and articles that answer the patron's need. Collects the items if they become overdue. Sends books and articles to other libraries requesting them from our collection. Works to retrieve those articles through the borrowing libraries if they become overdue.				
		Total Task Points:				
4	2.	During assigned hours, responsible for manning the check out desk. This front line work includes: checking materials in and out of the library, keeping track of holds, charging fines, taking Interlibrary Loan requests, screening telephone calls and incoming mail, accounting of the daily intake of money, evaluations and sales of donated materials. Also requires assisting patrons in the use of copier, microfiche reader, and typewriter. Additionally, it involves instructing and assisting patrons in the use of library computers with regard to library automation software, various Internet software, online databases, word processing, spreadsheets, and publishing software.				
		Total Task Points:				
4	3.	Conducts reference interviews in person and on the phone to determine specific informational requirement of the patron. Answers patron's reference questions or assists the patron in finding their own answer by using knowledge of the library collection, various online databases, Internet and community resources.				



EMPLOYMENT PERFORMANCE APPRAISAL		U N S A T I S F A C T O R Y	I M P R O V E M E N T  N E E D E D	A V E R A G E	E X C E L L E N T	O U T S T A N D I N G	
TASK WT.	TASK NO.						TASK DESCRIPTION

4	1.	Bibliographic Maintenance. Performs descriptive and subject cataloging and classification of both original and copy requiring the exercise of independent professional judgment. Obtains cataloging information from computer data bases and standard bibliographic tools for original cataloging. Creates new, or modifies, MARC records. Processes new materials. Deletes dated, lost, or damaged materials from the system.  Total Task Points:					
4	2.	Conducts reference interviews in person and on the phone to determine specific informational requirement of the patron. Answers patron's reference questions or assists the patron in finding their own answer by using knowledge of the library collection, various online databases, Internet and community resources. Continues upgrading of skills on the ever-changing databases.  Total Task Points:					
3	3.	During assigned hours, responsible for manning the check out desk. This front line work includes: checking materials in and out of the library, keeping track of holds, charging fines, taking Interlibrary Loan requests, screening telephone calls and incoming mail, accounting of the daily intake of money, evaluations and sales of donated materials. Also requires assisting patrons in the use of the copier, microfiche reader, and typewriter. Additionally, it involves instructing and assisting patrons in the use of library computers with regard to library automation software, various Internet software, online databases, word processing, spreadsheets, and publishing software.  Total Task Points:					
2	4.	Performs other duties as assigned.  Total Task Points:					

**EMPLOYMENT PERFORMANCE APPRAISAL**

EMPLOYEE:

POSITION: Library Cataloger/Reference

REPORTING PERIOD COVERED:

DATE:

U N S A T I S F A C T O R Y	I M P R O V E M E N T N E E D E D	A V E R A G E	E X C E L L E N T	O U T S T A N D I N G
1	2	3	4	5

TASK WT.	TASK NO.	TASK DESCRIPTION
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4	1.	Bibliographic Maintenance. Performs descriptive and subject cataloging and classification of both original and copy requiring the exercise of independent professional judgment. Obtains cataloging information from computer data bases and standard bibliographic tools for original cataloging. Creates new, or modifies, MARC records. Processes new materials. Deletes dated, lost, or damaged materials from the system. <p align="right">Total Task Points:</p>				
4	2.	Conducts reference interviews in person and on the phone to determine specific informational requirement of the patron. Answers patron's reference questions or assists the patron in finding their own answer by using knowledge of the library collection, various online databases, Internet and community resources. Continues upgrading of skills on the ever-changing databases. <p align="right">Total Task Points:</p>				
3	3.	During assigned hours, responsible for manning the check out desk. This front line work includes: checking materials in and out of the library, keeping track of holds, charging fines, taking Interlibrary Loan requests, screening telephone calls and incoming mail, accounting of the daily intake of money, evaluations and sales of donated materials. Also requires assisting patrons in the use of the copier, microfishe reader, and typewriter. Additionally, it involves instructing and assisting patrons in the use of library computers with regard to library automation software, various Internet software, online databases, word processing, spreadsheets, and publishing software. <p align="right">Total Task Points:</p>				
2	4.	Performs other duties as assigned. <p align="right">Total Task Points:</p>				

**EMPLOYMENT PERFORMANCE APPRAISAL**

EMPLOYEE:

POSITION: Library Clerk II, part-time

REPORTING PERIOD COVERED: 1/7/05 – 7/7/05 (6 months)

DATE:

U N S A T I S F A C T O R Y	I M P V M E N T  N E E D E D	A V E R A G E	E X C E L L E N T	O U T S T A N D I N G
1	2	3	4	5

TASK TASK  
WT. NO.

TASK DESCRIPTION

4	1.	During assigned hours, is responsible for the check out desk. This front line work includes: checking materials in and out of the library, keeping track of holds, charging fines, taking Interlibrary Loan requests, screening telephone calls and incoming mail, accounting of the daily intake of money, evaluations and sales of donated materials. Also requires assisting patrons in the use of the copier, microfishe reader, and typewriter. Additionally, it involves instructing and assisting patrons in the use of library computers with regard to library automation software, various Internet software, online databases, word processing, spreadsheets, and publishing software. <p align="right">Total Task Points:</p>					
4	2.	Conducts reference interviews in person and on the phone to determine specific informational requirements of the patron. Answers patron's reference questions or assists the patron in finding their own answer by using knowledge of the library collection, various online databases, Internet and community resources. <p align="right">Total Task Points:</p>					
2	3.	Assists in cataloging and processing, which includes adding books into the cataloging program of the library software and covering, labeling, and stamping new books. <p align="right">Total Task Points:</p>					
4	4.	Returns materials to shelves and keeps shelves in order. <p align="right">Total Task Points:</p>					
2	5.	Maintains newspaper and magazine shelves. <p align="right">Total Task Points:</p>					
3	6.	Notifies patrons by phone and mail regarding materials waiting for them and materials overdue or lost. <p align="right">Total Task Points:</p>					
2	7.	Fills in for other staff when needed. <p align="right">Total Task Points:</p>					

2	8. Performs other duties as assigned.	Total Task Points:				
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**OVERALL RATING OF PERFORMANCE IN UNIVERSAL JOB DIMENSIONS:**

(Mark the box to indicate the appropriate level.)

<input type="checkbox"/>	ABOVE AVERAGE -- exceeds standard
<input type="checkbox"/>	ACCEPTABLE -- meets standard
<input type="checkbox"/>	SUBSTANDARD -- requires timely improvement

**7. ATTENDANCE DURING RATING PERIOD:**

Review the employee's leave report for the past year and discuss the employee's faithfulness in coming to work daily and conforming to work hours. For example: Rate the employee's reliability in adhering to scheduled hours, his or her reliability and promptness in attending meetings, and whether or not the employee provides adequate notice for planned leave.

SUPERVISOR'S COMMENTS:

**OVERALL RATING OF EMPLOYEE'S ATTENDANCE**

(Mark the box to indicate the appropriate level.)

<input type="checkbox"/>	ABOVE AVERAGE -- exceeds standard
<input type="checkbox"/>	ACCEPTABLE -- meets standard
<input type="checkbox"/>	SUBSTANDARD -- requires timely improvement

**8. OVERALL PERFORMANCE IN ATTAINING OBJECTIVES SET IN PREVIOUS YEAR:**

Identify objectives achieved and objectives that require completion.

SUPERVISOR'S COMMENTS:

**OVERALL RATING OF EMPLOYEE'S ATTENDANCE**

(Mark the box to indicate the appropriate level.)

<input type="checkbox"/>	ABOVE AVERAGE -- exceeds standard
<input type="checkbox"/>	ACCEPTABLE -- meets standard
<input type="checkbox"/>	SUBSTANDARD -- requires timely improvement

**9. OBJECTIVES FOR THE COMING YEAR:**

After reviewing the Strategic Plan and last year's objectives, identify objectives for the coming year. Indicate high, medium, or low priority. Identify timetable for completion.

OBJECTIVES:

**10. JOB DESCRIPTION REVIEW:**

Review the job description with the employee and make changes as needed.

No Changes Needed

Changes Needed (Revised job description is attached.)

**11. EMPLOYEE COMMENTS (OPTIONAL):**

Not Applicable

See Attachment

**12 SIGNATURES INDICATING APPRAISAL HAS BEEN REVIEWED BY MANAGEMENT AND CONDUCTED WITH**

**THE EMPLOYEE:** The employee's signature does not indicate agreement with the content of this appraisal, but rather that the appraisal has been conducted.

MANAGER HAS REVIEWED APPRAISAL: \_\_\_\_\_ DATE: \_\_\_\_\_

EVALUATOR'S SIGNATURE OF COMPLETION: \_\_\_\_\_ DATE: \_\_\_\_\_

EMPLOYEE'S SIGNATURE OF COMPLETION: \_\_\_\_\_ DATE: \_\_\_\_\_

*[Insert library logo]*  
**PERFORMANCE APPRAISAL** *[Insert year]*

Name	Date
Position Title	Period of Review <i>[Insert year]</i>
Branch	Supervisor

Performance Management and Performance Appraisal process overview and instructions for completion.

*[Insert due dates, guidelines, etc]*

**Suggested weighting: The overall weighting for the *[insert year]* performance evaluation period as follows: 50% Core Competencies, 30% Essential Functions, and 20% Goals and Objectives.**

Individual Development should also be addressed at the beginning of the evaluation period. Discussions based on last year's performance, Library priorities, current goals, and educational needs are areas to discuss and consider before planning the year's individual growth goals. At the end of the planning discussion between the supervisor and the employee, a copy of the Performance Appraisal form is given to both the employee and supervisor for reference during the year.

Rating scale

The reviewer is to assign a rating using the scale below as indicated in the format and section instructions of the performance appraisal.

**Exemplary Performance.** Employee is consistently performing all aspects of the position responsibilities in a highly exceptional manner. Performance is the best that can be reasonably expected of an employee in a given position. All significant goals have been achieved and the employee has demonstrated innovative results in the assignments completed. Response to unplanned circumstances exceeds what would be expected.

**Quality (Quality Plus, Quality, & Quality Minus) Performance.** Employee is consistently meeting expectations in the sense the employee is performing all position responsibilities in a successful manner. The Employee's performance may be above expectations in some areas. Progress toward achieving the related goals of the position has been satisfactory. Unplanned circumstances did not prevent the meeting of goals.

**Needs Improvement (Performs at an acceptable level inconsistently.)** – Employee is performing below standard, or is meeting expectations in only a marginal manner, doing only the minimum that is expected of an incumbent in the position, or is not progressing in a satisfactory manner in learning or assuming the responsibility required of the job. The Employee's performance does not consistently meet standard in Part I, II, or III of the performance appraisal.

## **Part I - Evaluation of Core Competencies**

The following attributes describe expectations of work performance. How employees perform their jobs at *[Insert Library Name]* is as important as what employees do. In fact, this is so important that **this evaluation section has been given the highest overall weighting of 50%**.

An overall rating for this section is to be given by the Supervisor at the end of this section using the rating scale defined on the first page of this form.

*[Insert your library's core competencies below] [Suggested competencies are listed below.]*

1. Focuses on the Customer: Consistently demonstrates awareness that our customers enable us to thrive as a business. Listens and understands customers' needs and uses that knowledge to anticipate problems and provide even better service than the customer expects; treats internal customers with the same high level of service as external customers; looks for new opportunities to enhance customer satisfaction.

Comments

2. Takes Initiative: Acts quickly and independently when the situation demands it; sees a need and takes appropriate action without being prompted or reminded; proactively recommends process improvements or solutions to problems. Accomplishes this within the framework of the District policies and guidelines.

Comments

3. Contributes to a positive work environment: Works as a productive member of a team; treats others with respect and dignity; discourages negativity in the workplace; expresses concerns in a constructive way; demonstrates commitment to organizational goals; supports creative proposals for doing things a better way; helps others to embrace change.

Comments

4. Strategic Thinking: Understands the mission of organization; realizes how their job function impacts the operation of the organization; supports the organization by demonstrating flexibility, adjusts to changing job demands, deals creatively with challenges or problems.

Comments

5. Pursues Personal Development: Committed to personal learning; actively seeks opportunities for learning and self-development; requests feedback and welcomes advice when it's offered; alters behavior to reflect new insights and changing circumstances. Demonstrates personal commitment for delivering high quality expertise to customers.

Comments

6. Continuous Improvement: Seeks new and better ways to do their job; identifies ways to make improvements to processes and procedures to add value to the organization.

Comments

7. Takes Pride in the Workplace: Performs day-to-day activities and job responsibilities in ways that support the library's commitment to quality, provides a pleasant, safe, clean environment for patrons; speaks favorably about the workplace to customers.

Comments

Evaluation of Core Competencies

Supervisor's Summary Statements

## ***Rating***

### **Part II - Evaluation of Essential Functions**

Review the employee's position description and evaluate performance in relation to position requirements. Supervisors provide a summary rating at the end of this section. Be sure to include what the employee did well and what areas need improvement in the summary comments. Include plans for improvement in essential functions in this area. **This area has an overall weighting of 30%.**

1. *[Insert job duty statement from job description]*

2. *[Insert job duty statement from job description]*

3. *[Insert job duty statement from job description]*

4. *[Insert job duty statement from job description]*

5. *[Insert job duty statement from job description]*

6. *[Insert job duty statement from job description]*

Evaluation of Essential Functions

Supervisor's Summary Statements

**Rating**

**Part III - Evaluation of Goals**

Review individual and team goals for this review period, evaluate results achieved and give an overall rating for this section Goals should be listed in order of importance. (See the attached form Goal Planning Sheet for use in this section.) **The overall weighting for this section is 20%.**

Evaluation of Goals  
Supervisor's Summary Statement

**Rating**

**Part IV - Summary Comments**

Summarize the employee's overall performance including strengths and areas for improvement.

**Overall Performance Rating**\_\_\_\_\_

Employee Comments

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\_\_\_\_\_  
This review has been discussed with me.

Employee  
Signature\_\_\_\_\_ Date\_\_\_\_\_

Supervisor  
Signature\_\_\_\_\_ Date\_\_\_\_\_

Manager\_\_\_\_\_ Date\_\_\_\_\_



**[INSERT YEAR] GOAL PLANNING SHEET**

Complete and Return to Supervisor by *[Insert due date]*

Name	Job Title	Today's Date	Branch/Department
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**GOAL** (Specific, Measurable, Attainable, Realistic, Tangible/Time):


**Related to the following objective/goal from the Strategic Plan or Customer Service:**

<input type="checkbox"/> Check Box If Customer Service Related

*Benefits for achieving this goal:*


Possible Obstacles	Possible Solutions

Specific Action Steps for Achieving this Goal	Target Date	Date Reviewed	Date Completed
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			

10.			

<i>Method of tracking progress:</i>



*[Insert Library Logo]*  
PERFORMANCE APPRAISAL *[Insert Year]*  
Self Assessment - Review of Core Competencies

The following attributes describe expectations of *[insert library name]* work performance. Please review these areas prior to completing the self-assessment work sheet attached.

*[Insert your library's core competencies below.] [Suggested competencies are listed below.]*

- 1. Focuses on the Customer: Consistently demonstrates awareness that our customers enable us to thrive as a business. Listens and understands customers' needs and uses that knowledge to anticipate problems and provide even better service than the customer expects; treats internal customers with the same high level of service as external customers; looks for new opportunities to enhance customer satisfaction.**
  
- 2. Takes Initiative: Acts quickly and independently when the situation demands it; sees a need and takes appropriate action without being prompted or reminded; proactively recommends process improvements or solutions to problems. Accomplishes this within the framework of the library's policies and guidelines.**
  
- 3. Contributes to a positive work environment: Works as a productive member of a team; treats others with respect and dignity; discourages negativity in the workplace; expresses concerns in a constructive way; demonstrates commitment to organizational goals; supports creative proposals for doing things a better way; helps others to embrace change.**
  
- 4. Strategic Thinking: Understands the mission of the organization; realizes how their job function impacts the operation of the organization; supports the organization by demonstrating flexibility, adjusts to changing job demands, deals creatively with challenges or problems.**
  
- 5. Pursues Personal Development: Committed to personal learning; actively seeks opportunities for learning and self-development; requests feedback and welcomes advice when it's offered; alters behavior to reflect new insights and changing circumstances. Demonstrates personal commitment for delivering high quality expertise to customers.**
  
- 6. Continuous Improvement: Seeks new and better ways to do their job; identifies ways to make improvements to processes and procedures to add value to the organization.**
  
- 7. Takes Pride in the Workplace: Performs day-to-day activities and job responsibilities in ways that support the Library's commitment to quality, provides a pleasant, safe, clean environment for patrons; speaks favorably about the workplace to customers.**

*[Insert Library Logo]*  
PERFORMANCE APPRAISAL *[Insert Year]*  
Employee's Self-Assessment Work Sheet

Complete and return to Supervisor by *[Insert Due Date]*

**NAME**

**Position Title**

**Branch/Department**

**DATE**

**Period of Review** *[Insert Date]*

**Supervisor**

1. **What tasks, duties, assignments, or other accomplishments would you like to see recognized in this performance appraisal?**
  
  
  
  
  
  
  
  
  
  
2. **What have you done over the past year to improve your job performance?**
  
  
  
  
  
  
  
  
  
  
3. **What can you do over the coming year to improve your job performance and/or increase your job satisfaction?**
  
  
  
  
  
  
  
  
  
  
4. **Please list any areas you would like to improve or change within your department, organization and/or team(s).**

*[Insert library logo]*  
**PERFORMANCE APPRAISAL** *[Insert year]*  
**Part III – Staff Self Evaluation of Goals**

**Employee Name** \_\_\_\_\_ **Date** \_\_\_\_\_

**Evaluation of Goals**

Employees Summary Statement – Summarize the outcome of your personal development goals. Include in this summary any unexpected results or individual growth attained by completing this process. (Attach Goal Planning Sheet)

**Rating** (E=Exemplary, Q=Quality, NI= Needs Improvement) \_\_\_\_\_



**JOB ORIENTED DIMENSION VALUES**  
(Examples of “Qualities Admired” versus “Qualities Regretted”)

**Flexibility:**

YES! Coworkers who adjust their priorities with a positive attitude and without complaining at length when unexpected changes occur. Changes are to be expected and complaining only irritates people and makes adjustment more difficult.

YES! Coworkers who adjust willingly to change (new procedures, new staff, etc.)

YES! Coworkers who plan ahead well enough to be able to effectively handle several projects/tasks at one time, adjust for unexpected interruptions and still get work done on time.

**Problem Solving:**

YES! Coworkers who attempt to arrive at a reasonable solution when routine problems arise.

YES! Coworkers who use their own initiative to try to think of a possible solution before presenting a problem to the supervisor and before being asked. If someone notes a problem, please try to present some solution ideas along with the problem. Not every proposed solution can be implemented because there are sometimes other factors to consider. However, people who attempt to think of realistic answers are appreciated.

YES! Coworkers who demonstrate good judgment by knowing **WHAT** and **WHEN** to refer something to a supervisor, as well as **WHEN** to try solving a problem themselves.

**Interpersonal Skills:**

YES! Coworkers who are teamwork oriented, willing to help others **when it is appropriate**; i.e., when the supervisor asks for help for someone, if you **truly** do not have something urgent to do and someone else is **truly** in need of help, please be willing to help.

YES! Coworkers who are teamwork oriented and who realize how their work impacts the work of others, who ensure that the work flow keeps going in a smooth manner.

YES! Coworkers who stop and think if they would appreciate being treated or spoken to like they are treating and speaking to others.

NO! Coworkers who have a bad day (everyone does at times) and inflict their mood on others, causing them to also have a bad day.

NO! Coworkers who frequently frown and appear miserable. Others wonder if this person is angry or if something bad has occurred.

NO! Coworkers who suddenly “explode” all over someone. This is very non-productive for everyone and doesn’t make the person look good, either.

NO! Coworkers who always assume the worst possible meaning in the actions or words of others. Most people are well intentioned in what they do and what they say. We are all human, yet on occasion we may inadvertently say something that makes someone unhappy.

YES! Someone who finds a kind and clear way to tell others when and how they have upset them. Other people may have no idea what they have done or not know how to “fix” it. Hurting someone else’s feelings in retaliation for a perceived insult will not solve any problems. The key to good working relations is open and honest communication.

YES! Coworkers who try to be sensitive (without being nosy) to other people’s need for space. Space for some people may be physical, or a noise level, absence of conversation, or just not talking about personal issues that should be left for off-work times, anyway. Space for someone else may be very minimal and they may enjoy closeness.

NO! Coworkers who are overly concerned about what they perceive others may be doing, or not doing, and then comparing their observations with other coworkers. Coworkers who spend their time “checking-up on others” are not productive, are not doing their own jobs well, and generate poor morale for everyone else.

### **Communication Skills:**

YES! Coworkers who remember to appropriately inform the correct people about problems or events that they need to be aware of.

YES! Coworkers who, after making an effort to solve a problem themselves, promptly inform the supervisor that they are experiencing a problem on the job so that action can be taken to resolve the problem.

YES! Coworkers who know how to properly and effectively use voice mail and memos. Memos and voice mail can be handled when the receiver’s time permits. A “quick” question in-person can take 10 – 15 minutes, while voice mail requires only 2+ minutes. A memo can be retained for future reference or read again. The author of a memo frequently organizes and explains issues better in writing - fewer details are forgotten, either by initiator/receiver of a memo or a voice mail message.

YES! Coworkers who remember to keep accurate statistics and notes relevant to the job or task they are performing.

YES! Someone who kindly and honestly tells another of a problem or irritation and then attempts to work it out instead of allowing the frustration to build until an “explosion” occurs.

YES! Coworkers who inform others of ideas or issues in a well-thought-out manner, i.e., what is the issue, why is it important, and what are any possible solutions or plans. It is important to be clear, concise and accurate without unnecessary digressions or dramatization. Get to the point.

YES! Coworkers who understand that constantly interrupting others (coworkers or supervisors) is not productive and builds frustrations. Make a list of issues or questions to communicate and 1) make an appointment to address them, or 2) write them a concise, clear memo, or 3) leave them a voice mail message.

### **Customer Service:**

YES! Coworkers who remember that everyone is a customer. Customers justify our existence. The customers served include: each other (accomplishment of each job depends on the accomplishment of someone else's job), school staff, students, library customers, and other libraries. Strive to provide the type of service you appreciate.

YES! Coworkers who respond quickly to requests for service. Even when the response is that the latest request must wait or cannot be done at all, this response must come quickly and with a cheerful attitude. The customer has no idea what your task load is or what your limitations may be at this time, so customers must be told in a non-defensive manner (clearly and concisely). If a request can be accommodated, then the customer needs to quickly (and briefly) be told when it will be successfully completed.

### **Punctuality/Dependability:**

YES! Coworkers who arrive when expected or request permission to be late from the supervisor in a timely fashion (barring emergencies). This means showing up and being ready for work on time, not abusing breaks (which are a privilege, not a right or a benefit) or lunches, and not wasting unnecessary time by getting extra cups of coffee or snacks or taking additional smoke breaks.

YES! When someone is late, they acknowledge it and make arrangements to make it up or submit a leave slip immediately and without prompting by the supervisor.

YES! Coworkers who deliver assignments, memos, reports or other projects at the agreed-upon time, no excuses. If a problem begins to surface and appropriate planning has been done, then the problem can be resolved in a timely fashion.

NO! Coworkers who, at the last minute when something is due or expected, present a litany of reasons why it didn't get done. This behavior disrupts the planning of others and reveals that the person did not plan well or take into consideration the possibility of emergencies.

YES! Someone who volunteers to take on responsibilities or tasks, regardless of how big or small, how important or "trivial."

NO! Coworkers who are not organized and are constantly running about frantically for this or that or scrambling to get something done at the last minute.

**Work Quality:**

YES! Coworkers who turn out accurate work nearly all of the time so that others do not have to waste time repairing the damage later. This means attention to detail and rechecking.

**Follows Policies/Procedures:**

YES! Coworkers who follow the procedures for the job they are performing.

YES! Coworkers who make sure to check on all Policies and Procedures instead of assuming that something can, or cannot, be done.

YES! Coworkers who notice possible improvements for policies or procedures, research those possible improvements, and submit through channels for review.

**Job Knowledge:**

YES! Coworkers who make a concerted effort to know and really understand their job, what it entails, and exactly how to perform it to the very best of their ability. Quality work makes for quality customer service, a great staff and excellent library image.

YES! Coworkers who are willing to take on and learn more!

**Productivity:**

YES! Coworkers who take the responsibility of meeting their goals on time and produce work to be proud of.

YES! Coworkers who do as much work as they can during their work shift instead of slowing down to keep people from expecting too much from them.

**Initiative/Judgment:**

YES! Coworkers who do not waste either their time or that of others.

YES! Coworkers who understand what confidentiality means.

YES! Coworkers who stop rumor generation by refusing to participate and/or by appropriately seeking out the truth.

YES! Coworkers who know when they should personally handle something and when they should refer it on to someone else.

YES! Coworkers who know what is important to communicate and what is unnecessary.  
(Always strive to be concise, clear and to the point.)

NO! Coworkers who share negative thoughts, talk or speculation (rumors, running others down).  
This behavior is easy to fall into, it is contagious and very addictive. Many people do not even realize they are doing it, they just think everybody is in a bad mood.

**Work Place Safety:**

YES! Coworkers who think of safety before attempting to do something.

YES! Coworkers who notice ways to improve a situation and then take the initiative to suggest it.

YES! Coworkers who notice potentially unsafe situations and report them, or brainstorm with others as to how best to correct them.





# TEMPORARY EMPLOYEE PERFORMANCE APPRAISAL REVIEW

## EMPLOYEE INFORMATION

EMPLOYEE NAME	JOB TITLE	DEPARTMENT <i>Library &amp; Recreation Services</i>
Employee Number	Appraisal Period from: _____ To: _____	Type of Review Annual _____ Other _____

## RATING SCALE & DIRECTIONS

<b>Value:</b>	<b>5 Exceptional:</b> Unique and exceptional accomplishments <b>4 Exceeds standard:</b> Clearly and consistently above what is required <b>3 Fully Meets Standard:</b> Consistently meets the requirements of the job <b>2 Partially Meets Standard:</b> Sometimes acceptable, but not consistent <b>1 Unacceptable:</b> Does not meet the minimum requirements	<b>DIRECTIONS:</b> Enter the numeric value corresponding to the performance level of each of the following performance dimensions. Not all dimensions may apply. Use 0 if not applicable and divide total by the number of dimensions actually used. Use whole numbers.
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**Note: Final scores below 2 are not eligible for the annual salary adjustment. Percentage for adjustment is finalized each January**

## EMPLOYEE PERFORMANCE DIMENSIONS & SCORING

<p><input type="checkbox"/> value <b>Communication</b></p> <ul style="list-style-type: none"> <li>* Listens effectively</li> <li>* Responds clearly and directly</li> <li>* Seeks to clarify and confirm the accuracy of their understanding of unfamiliar or vague terms</li> <li>* Makes oral and written communication clear and easy to understand</li> </ul> <p><input type="checkbox"/> value <b>Customer Service:</b></p> <ul style="list-style-type: none"> <li>* Maintains customer service orientation</li> <li>* Exhibits appropriate behavior toward customers</li> <li>* Responds in a timely and appropriate manner to customer's and citizen's concerns</li> <li>* Maintains and promotes awareness of customer needs</li> </ul> <p><input type="checkbox"/> value <b>Dependability/Punctuality:</b></p> <ul style="list-style-type: none"> <li>* Reports to work on time</li> <li>* Reports schedule changes promptly to supervisor</li> <li>* Meets commitments</li> <li>* Works independently</li> <li>* Follows through on work assignments</li> <li>* Willing to assist co-workers</li> <li>* Meets attendance requirements</li> </ul> <p><input type="checkbox"/> value <b>Initiative/Judgment:</b></p> <ul style="list-style-type: none"> <li>* Makes appropriate and consistent decisions</li> <li>* Uses logic and common sense in decision making</li> <li>* Sees and acts upon opportunities</li> <li>* Independently contributes ideas and projects</li> <li>* Acts independently within established guidelines</li> <li>* Promptly undertakes problems and devises solutions</li> </ul> <p><input type="checkbox"/> value <b>Job Knowledge:</b></p> <ul style="list-style-type: none"> <li>* Understands job duties and responsibilities</li> <li>* Has necessary job skills and knowledge</li> <li>* Has technical skills, knowledge</li> <li>* Understands, operates equipment</li> <li>* Keeps current with new developments</li> </ul>	<p><input type="checkbox"/> value <b>Policies and Procedures:</b></p> <ul style="list-style-type: none"> <li>* Applies City and Department policies &amp; procedures</li> <li>* Works in accordance with established procedures</li> <li>* Takes policies into consideration when developing new procedures</li> <li>* Makes suggestions for improvements in policies and procedures</li> </ul> <p><input type="checkbox"/> value <b>Problem Solving:</b></p> <ul style="list-style-type: none"> <li>* Anticipates and prevents problems</li> <li>* Defines problems, identifies root cause</li> <li>* Overcomes obstacles</li> <li>* Generates alternative solutions</li> <li>* Helps solve team problems</li> </ul> <p><input type="checkbox"/> value <b>Productivity:</b></p> <ul style="list-style-type: none"> <li>* Manages a fair work load</li> <li>* Takes on additional responsibilities as needed</li> <li>* Manages priorities</li> <li>* Manages time well</li> <li>* Attains conclusive measurable results</li> <li>* Completes assignments on time and to specifications</li> </ul> <p><input type="checkbox"/> value <b>Work Quality:</b></p> <ul style="list-style-type: none"> <li>* Is attentive to detail and accuracy</li> <li>* Actively supports quality standards</li> <li>* Makes continuous improvements</li> <li>* Monitors quality levels</li> <li>* Owns and acts on quality problems</li> <li>* Consistently delivers what is required when required</li> </ul>
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**TOTAL:**

Total for all dimensions NOTE: Use 0 for score if dimension is not applicable.

**DIMENSIONS:**

Divide by actual number of dimensions used.

**9**

**FINAL:**

Final evaluation weighted score

## COMMENTS

Supervisor's Comments: \_\_\_\_\_

Employee's Comments: \_\_\_\_\_

## SIGNATURES

Employee: \_\_\_\_\_ Date: \_\_\_\_\_ Appraiser: \_\_\_\_\_ Date: \_\_\_\_\_

(Employee's signature does not necessarily signify agreement with the appraisal; it simply means that the appraisal has been discussed with you).

Appraiser's Supervisor: \_\_\_\_\_ Date: \_\_\_\_\_