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

One take away?
hello

introductions

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?

1. Observable behaviors
2. Teamwork
3. Communication – Interpersonal Skills

2. Work-related behavior
UF Process
Improvements ....

Coming next year
Annual Evaluation – March 1 – February 28
due March 30
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 30th
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

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
Overall Ratings

- **Exceeds**
- **Above Average**
- **Achieves**
- **Minimally Achieves**
- **Below Performance Standards**
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

[ ]

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

- Assistance
- Presentation/Demeanor
- Communication/Respect
- Service
- Phone manner
- Electronic communication
Initiative and Productivity

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

• Motivation
• Organizational skills
• Vision
• Work volume
• Work accuracy
You cannot be effective without teamwork and interpersonal skills
Rate Each Performance Category
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 evaluation based on the rating categories listed below, must be entered on this form. The overall evaluation should be consistent with the evaluative comments on the narrative. Please contact your Employee Relations Satellite office prior to issuing an overall evaluation of "Minimally Achieved" or "Below".

- **Exceeds**: Almost always exceeds performance standards. Consistently produces excellent quality work, is innovative, and demonstrates high-level leadership qualities.
- **Above Average**: Consistently meets and regularly exceeds performance standards. Able to work independently.
- **Achieves**: Generally meets performance standards. Seldom exceeds or fails short of desired results. Able to work independently, but sometimes requires direction.
- **Minimally Achieves**: Frequently fails to meet performance standards. Requires frequent instruction and supervision.
- **Below Performance Standards**: Fails to meet performance standards.

Employee's Acknowledgment of Review and Receipt:

By signing below, I acknowledge that my evaluation has been reviewed with me, and I have entered 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.

As an employee, I may engage in any outside activity that interferes with the full performance of professional responsibilities or other institutional obligations in keeping with UF Regulation C21-1.011, which governs disclosure of outside activities and financial interests. Please check applicable box (as of this date):

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

Employee's Signature  Date

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

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Annual appraisals must be issued, signed, and dated by employees no later than March 31.

Forms should be mailed or delivered to Human Resource Services, Attn: Kitty Higgs, Employee Relations, PO Box 110141, Campus. Phone: (352) 392-2477.
Performance Categories for TEAMS Exempt

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
A 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 your job - 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
Design an online training guide for student assistants.
Development Goal - Example

Increase my effectiveness in using Excel spreadsheets.
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:

| S | Specific & Strategic  
Outline exactly what you hope to accomplish and what the impact will be. |
| M | Measurable  
There must be some way of measuring and verifying whether the objective has been achieved and to what level. |
| A | Attainable  
Attainable; not so lofty that you can’t achieve them and not so simple that you won’t be challenged. |
| R | Relevant  
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. |
Example 1

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 training 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 2018 incoming student assistants.
SMART GOALS

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Creating a Learning Organization with a culture that strengthens collaborative initiatives takes skills and practice.

For Supervisors

For Employees
Who’s in charge?

• You may feel powerless but…
  • It’s the receiver who is in charge
    • You decide what you will accept
    • You decide what sense you will make of it
    • You decide whether or not and how you will change

Credit: Sheila Heen, researcher at Harvard Negotiation Project
Five Tips

Start the meeting on a positive note

- I’m looking forward to this conversation
- I want to understand how you’re thinking about my year
- I want to understand where the department is headed
- I want to understand what you want me to work on

Tip ONE
Five Tips

Concentrate on Clarity

- Let go of defensiveness
- Focus on clarity – understand what your supervisor is saying
- Ask a ton of questions
- If the feedback is vague like “I’d love you to be more proactive” ask “What would that look like? What would I change?”
- Understand the specific behaviors your supervisor is talking about
As professionals we toggle between...

The need to learn and grow,

The need to be accepted and respected the way we are now
Five Tips

Tip THREE

If you need a time-out, take it

- Your supervisor says something you think is wrong or unfair
- You feel defensive – like crying or snapping at them
  - you may say something that will damage your relationship or reputation
- Request a break – regain your calm – think about what set you off and return to the conversation – ask specific question
Five Tips

Ask for specific feedback

- Your supervisor piles on the praise and avoids any hint of negativity
- We could all stand to raise our game
- Ask for specific feedback on areas you would like to improve in like “What is one thing I could change about the way I interact with the team that you think would help?”
  - Asking for coaching – feedback to help you – rather than just praise or criticism
Five Tips

Enlist a friend to evaluate any criticism

- You may be troubled by your supervisor’s comments about your performance
- Ask a friend your trust to help you sort through the comments – give some perspective.
- Ask, what might be right about this feedback? – provides an honest mirror – helps you see things you can’t see yourself.
Make sure you come away from your performance evaluation meeting with information you can use.
Creating a Learning Organization with a culture that strengthens collaborative initiatives takes skills and practice.

Building Teams
Think about it...

Each one of us has a responsibility to be a contributor to our team.
Building Teams

What specific feedback could you give your team members that would build a stronger team?
https://www.ted.com/talks/margaret_heffernan_why_it's_time_to_forget_the_pecking_order_at_work?language=en#t-4882
A few tools to help us understand ourselves in relation to others
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.”
Implicit Bias – understand yourself better

• The gap between intentions and actions.
• Participate here: https://www.projectimplicit.net/index.html

“The attitudes or stereotypes that affect our understanding, actions, and decisions in an unconscious manner.”
Building Teams

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 your team.
Have we missed anything?
What is your ‘take away’?
Thank You