

## **PERFORMANCE REVIEW OF LIBRARIANS**

### **POLICY**

Performance review is the annual process in which a librarian and his/her supervisor discuss, document, and evaluate the librarian's job performance. It is the formal procedure by which the librarian and the supervisor improve communication, promote team effort in the unit, foster the professional development of the librarian, and determine performance/merit level. The chief considerations are the level of performance based on the job description and the achievement of annual goals. The outcome of the review is used to determine performance/merit level for establishing salary increases. The cumulative documentation resulting from this process is also used for transfer and advancement within the Library system.

The annual review is based on written individual performance goals developed by each librarian with his/her immediate supervisor. During the performance review, the librarian and supervisor discuss the achievement of the past year's goals and agree upon the librarian's goals for the coming year. These performance goals should relate to and support the unit's goals. They may be reviewed and revised, as needed. Midway through the year, the librarian and supervisor will review the goals to determine if any adjustment is required. When librarians join the staff, they should prepare performance goals during their third month. In this initial effort at establishing goals, the supervisor provides close direction.

The performance/merit level resulting from this performance review process is intended to reward librarians differently according to the degree and quality of their achievements and contributions. This is in accordance with the University policy that salary increases are based on merit. The percentage of salary increases varies from year to year depending on salary resources. Performance review is not a competitive process among peers.

To provide guidance during the review process, performance criteria have been identified, with sample factors described for each criterion. The supervisor should use these criteria in evaluating the librarian's job performance and goal attainment.

## INDIVIDUAL PERFORMANCE GOALS

The University of Michigan Library has established a performance review process based on the development of individual performance goals. The purposes of this goals-based system are to facilitate communication between librarian and supervisor, to foster professional development of the librarian, and to establish merit level.

Goals follow from a librarian's job description and the goals of the unit in which the librarian is employed. Personal goals should reflect an individual's job duties and support the goals and activities of the unit. Librarians new to the University Library should develop their first set of performance goals during the third month of their employment.

Individual goals are written by the librarian and supervisor once a year following the establishment of annual unit goals. The goals may be reviewed at anytime during the year by the librarian and supervisor if job duties or other circumstances significantly alter the goals of the librarian or if changing circumstances dramatically impact his/her ability to work toward meeting the goals. At this time, goals may be modified. In any case, midway through the year the librarian and supervisor will review the goals to determine if any alteration is needed. Any deletions, additions or changes in goals should be attached as an addendum to the original annual goal document. During the performance review, the supervisor reviews and evaluates each librarians progress toward the attainment of these goals.

### WHAT ARE GOALS?

Goals are statements of what the librarian hopes to achieve during a specific period of time. Goals do not detail how a task is undertaken, only the outcome the librarian wishes to achieve. They should be challenging but attainable.

Goals may relate to continuous job responsibilities, to specific one-time projects, to implementation of new services or operations, or plans for improvement of service or production. Some types of goals will be applicable every year, others will be projects to be accomplished within a year's time period. For each year, however, all significant investments of time and energy should be covered by a goal.

### WHAT GOALS ARE NOT

A goal is not a job description or a list of activities. A goal is not what is done, but instead is the outcome one hopes to accomplish.

A goal is not a process or aim which is outside of the librarian's responsibility or control.

A goal is not a quick one-time activity which can be accomplished with little time or effort

## EXAMPLES OF GOALS

"Establish University Library electronic bulletin board for three faculty departments."

"Select resources in the areas of old English and medieval" studies for the Graduate Library."

"Respond to 90% of reference requests received by e-mail or fax within 48 hours."

"Add MESH headings to all copy and original monographs in medical science."

## STEPS IN WRITING GOALS

Outline the major continuing responsibilities of the position. Write a goal for each which expresses the result to be achieved in the coming year.

Write goals for specific projects to be undertaken during the coming year. The librarian and supervisor review and mutually agree on the goals by which the librarian will be evaluated.

Prepare the final goal document for the coming year. The document should be signed by both the librarian and supervisor.

## GOAL BASED EVALUATION

Performance evaluation is based on the supervisor's examination of the librarian's progress toward attaining goals and performance of duties as described in the position description. Circumstances during a year may preclude the attainment of particular goals, and the supervisor takes this into account during evaluation.

Each supervisor will evaluate individual librarians from a different viewpoint, and each librarian brings a unique situation to the evaluation process. There are, however, five criteria which are likely to be applicable in evaluating the job performance and goal attainment of each librarian.

- \* Job knowledge, skills, and overall performance
- \* Initiative and creativity
- \* Leadership and teamwork
- \* Interpersonal relations
- \* Supervisory/Managerial skills (when applicable)

**REVIEW**  
**OF GOALS AND PERFORMANCE EVALUATION**

1. The librarian, in consultation with his or her supervisor, writes goals for the year. These goals are based on the librarian's job description and the unit goals.
  - a. The supervisor reviews the goals of his or her librarian staff.
  - b. The division or cluster head reviews the goals for appropriateness, consistency and fairness, and provides a summary to the appropriate Associate University Librarian as requested.
  - c. During the year, the librarian and supervisor discuss progress toward goals.
2. In late spring, the librarian's performance evaluation is written, based on the attainment of goals as well as the job description.
  - a. The division or cluster head reviews the evaluation for appropriateness, consistency and fairness.
  - b. The division or cluster head provides a summary of the evaluation to the appropriate Associate University Librarian.
  - c. Associate University Librarians or the University Librarian may review any goals or evaluations as necessary or appropriate. As needed or as requested by a librarian or supervisor, the appropriate Associate University Librarian or the University Librarian may review individual goals or evaluations, following established personnel procedures.