



Eff. Date:

Rev. Date:

Applicability

This policy applies to all employees of the Branch District Library (BDL), although the Board of Trustees may choose to handle the Director's evaluations as it sees fit.

Reason for Policy

The purpose of the policy is to ensure a continuous process of reviewing, analyzing and evaluating employee job performance, which includes work behavior. The objective is to establish and maintain a clear understanding between supervisor and employee of the employee's job duties, responsibilities, and authority.

Policy Statement

The BDL Board of Trustees believes that our library will function best when all employees fully understand their jobs, what is expected of them with regard to their work and their work behavior, and how well they are doing. That understanding is best accomplished by ongoing communication between the supervisor and employee about the job and the employee's performance, capped by at least one formal performance evaluation meeting and written evaluation each year. Current employees will receive their formal annual evaluation on the anniversary date of their current employment with the BDL or as otherwise specified in their employment contract. New BDL employees, and current employees who transfer or promote to new jobs with significantly different duties, will also receive formal evaluations after their first 3 and 6 months of employment.

Procedures – Supervisors

1. Supervisors will meet with new BDL employees and BDL employees who move to new positions on the first or second work day to explain their jobs and performance expectations to them in detail and to assess the employee's knowledge, skills, abilities, and personal characteristics (KSAPCs) to perform the work for which they were hired. Any gap in the KSAPCs should be noted as a training and development need.
2. The supervisor should make a plan to address any identified training and development needs.
3. Supervisors are responsible for monitoring and praising or correcting performance as appropriate on an ongoing basis.
4. Supervisors are responsible for maintaining their own performance records (electronic or paper) of their observations of each employee's work and behavior, and of any commendations or complaints received about an employee. There should be one such record for each employee. Written records are to be maintained in a locked file cabinet or some other secured location.
5. Supervisors are responsible for conducting formal performance evaluation meetings and written evaluations after the first 3 months and 6 months of work for new employees and current employees changing to a significantly different new job, and annually on the anniversary date of employment (or as specified in their contract) for all employees. These formal evaluation discussions and written evaluations should also be conducted whenever there a significant change in work performance or behavior occurs.
6. Supervisors may conduct informal evaluations or coaching and counseling sessions at any time provided that all such sessions and the reasons for them are recorded in the supervisor's performance record for the employee.

7. Supervisors are responsible for ensuring that employees have training as needed to understand or be able to perform their jobs and/or what is expected of them while on the job.

Procedures – Employees

1. Employees are responsible for being sure that they understand what is expected of them in terms of their job duties, standards of performance and work behavior.
2. Employees are responsible for asking their supervisors for clarification or direction whenever they are unclear about what is expected of them.
3. Employees are responsible for preparing a self-evaluation using the form or directions provided by their supervisors. Typically, self-evaluations will be required before the annual performance evaluations, but they may also be required at any other time at the supervisor's discretion.
4. Employees will be given the opportunity to review and comment on formal evaluations before they are finalized.

Procedures – The Conduct of the Formal Evaluation

1. The supervisor will inform the employee of the date and time of the formal evaluation, giving the employee sufficient time to prepare for the meeting.
2. The supervisor will direct the employee to complete a written self-evaluation.
3. The employee will submit the written self-evaluation to the supervisor at least 2 days before the scheduled performance evaluation meeting.
4. The meeting will be conducted in private.
5. In the meeting, the supervisor and employee will discuss:
 - a. the employee's performance and work behavior, including the employee's self-evaluation and the supervisor's evaluation;
 - b. the employee's accomplishments and deficiencies;
 - c. compliments and complaints, if any, which the supervisor has received about the employee;
 - d. changes, if any, the employee must make to improve performance or behavior;
 - e. changes that may need to occur in the employee's job; and
 - f. any training or development the employee may need or desire.
6. Following the meeting the supervisor will prepare or finalize the written evaluation.
7. The employee will have a chance to review the written evaluation and add any written comments to it.
8. The employee will be asked to sign the evaluation. The signature does not indicate that the employee agrees with the supervisor's evaluation; it merely indicates that the evaluation was discussed with the employee and that the employee has received a copy of the written document.
9. The final written document and any attachments will be placed in the employee's official personnel file.

Procedures – Appeals

An employee who disagrees with the final evaluation may appeal it to the Personnel Committee of the BDL Board of Trustees:

1. The appeal must be submitted in writing and must list the specific parts of the evaluation with which the employee disagrees and the specific reason for each area of disagreement.
2. The Personnel Committee will review the written appeal and will decide to grant the appeal, deny the appeal or schedule a meeting to discuss the appeal before making a decision.
3. The employee, supervisor and Director will be notified of the Personnel Committee's action.



BRANCH DISTRICT LIBRARY EMPLOYEE SELF-EVALUATION FORM

Name: _____ Date: _____

Title: _____ Department: _____

Please complete the questions listed below and return to your supervisor prior to your performance evaluation. As you complete the form, consider your own personal performance as it relates to your current job description and expectations for the review period.

1. What is your understanding of the overall purpose of your job? _____

2. List the expectations for the review period and assess how well you have succeeded in meeting each expectation. Attach a separate sheet if necessary. _____

3. What changes in duties or priorities did you face during the review period and how did you handle them? _____

4. What are your strengths (the things you do well) and how do you put them to use in your position? _____

5. What are your weaknesses (the things you don't do so well) and how do they impact your job? _____

6. What would help you enhance your performance (training, equipment, etc.)? _____

7. What are your expectations for the coming evaluation period? _____

8. How would you rate your overall performance for this review period?

Outstanding _____ Exceeds Expectations _____ Meets Expectations _____

Below Expectations _____ Unsatisfactory _____

9. Any comments you would like to add, please do so. _____



**Branch District
Library**

Performance Evaluation

Employee Name

Job Title

Date of Hire Supervisor

Review Period to

	Outstanding	Exceeds Expectations	Meets Expectations	Improvement Needed
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1. **Quality** - Completes work thoroughly and correctly following established processes and procedures.

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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Specific Examples / Comments:

2. **Productivity / Independence / Reliability** - Works independently with little or no direction or reminders to complete tasks / assignment.

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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Specific Examples / Comments:

3. **Job Knowledge** - Demonstrates an understanding of the instructions, processes, equipment, and resources required to perform the job.

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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Specific Examples / Comments:

4. **Cooperation / Commitment** - Cooperates, works, and communicates well with coworkers, supervisors, subordinates and/or outside contacts. Accepts and responds to change in a positive manner. Accepts job assignments and additional duties willingly and takes responsibility for own performance and job responsibilities.

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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Specific Examples / Comments:

5. **Attendance** - Has an acceptable overall attendance record, is rarely tardy, and does not abuse work break/meal periods.

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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Specific Examples / Comments:

Performance Evaluation

Employee Name

	Outstanding	Exceeds Expectations	Meets Expectations	Improvement Needed
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6. **Initiative / Creativity** - Seeks out new assignments, suggests ideas to eliminate waste, and finds new and better ways of doing things.
Specific Examples / Comments:

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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7. **Behavior** - Follows BDL policies and procedures. Treats colleagues and patrons with kindness and respect.
Specific Examples / Comments:

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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8. **Other** (Specify):
Specific Examples / Comments:

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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Overall Performance

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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Specific areas that need improvement

Employees comments

Discussed / reviewed with employee on:

Manager / Supervisor Signature

Date

Note: The employee's signature does not indicate agreement with the contents of the evaluation. It only means the employee acknowledges that it was discussed with her/him.

Employee Signature

Date