**Trochu Municipal Library Performance Review Policy**

A performance review should include:

- A positive opportunity for the Library Manager, Library Staff and the Board. The purpose of the   performance review is to review the Library Manager's performance in terms of fulfilling expectations of the Library Manager's job description.
- A time for the Board to recognize the assets of and contributions the Library Manager makes for the library service.
- An opportunity to obtain feedback from the patrons of the library on how the Library Manager delivers library services to meet the patron's library needs
- The outcomes should include the following,
    - A determination of what changes to library services are needed by the library manager and a plan for how those changes might occur. A service delivery plan is developed collaboratively with the Board and the Library Manager
    - Future learning and training goals for the Library Manager
    - A review of working conditions to ensure reliable library services to the public

**Trochu Municipal Library Performance Review Procedure**

- The Performance Review for the Library Manger will be conducted "in camera" by the Personnel Committee.
- The Performance Review Committee will be made up of Board Chair or appointed designate and one other Board Member.
- The Performance Review will be presented to the Board as a whole and will be kept in confidence between the Library Manager and the Board.
- The Library Manager will conduct the library staff's performance reviews.
- The Performance Review Reports are considered confidential and discussed only with the Board and the employee.
- A documented report is filed in the employee's confidential file.

## Timeline of Performance Review

1. The performance review process is a collaborative process. Employee feedback forms (Appendix A and Appendix C) will be given to the employee in January of each year. The designated members of the Personnel Committee that have been appointed to conduct the Library Manager performance review will complete the Performance Review Worksheet (Appendix B) before the Library Manager Performance Review occurs.
2. The employee feedback forms should be returned to the Personnel Committee by the first of February. The feedback forms (Appendix A and Appendix C) will be brought to the Performance Review and discussed with the Performance Review Committee.
3. The library patrons will be asked to complete a Library Patron Feedback Form. The form will be given to the patrons by the library staff or the form can be obtained from the Trochu Library Website. The Library Patron Feedback Form will be placed in a secured and sealed box at the Trochu Library from mid January to the end of February. The opportunity for library patron feedback will be advertised on the Trochu Library Website.
4. The Personnel Committee will compile the results of the Library Patron Feedback form (Appendix F) and report the analysis to the Trochu Library Board.
5. The Personnel Committee will arrange a performance review time with the Library Manager within the month of March. The Library Manager Evaluation Form will be completed and placed in the Manager's Employee File (Appendix D)
6. The Library Manager will conduct performance reviews with the library staff before the end of March of each year. If the Library Manager identifies a special goal that the library staff needs to achieve, that will be documented in the performance review. The performance reviews will be documented and kept in a confidential employee file. (Appendix E)
7. Performance Reviews involve setting targets or goals with the Board, discussing performance expectations, determining staff development opportunities, and evaluating the results. Staff development will be approved by the Library Board.

8. Goals for the performance review will be developed collaboratively with the Library Manager and the Personnel Committee. The goals will be discussed with the Library Board at the April board meeting. One or more goals or objectives will be collaboratively set using a Professional Development Plan (Appendix C)

## General Employee Feedback – Appendix A

1. What aspects of your present job give you:

   a) the most satisfaction and why?

   b) the least satisfaction and why?

2. What do you consider to be your most important achievements of the past year? Why?

3. What elements of your job do you find the easiest and which are the most difficult?

4. What actions could be taken to enhance your performance and satisfaction in your current position? These actions need to be defined as goals that are specific, measurable, action orientated, realistic and timely.

## Performance Review Worksheet – Appendix B

The employee and the Board will each complete this document prior to the annual review meeting.

Please make comments on the following areas:

1. **Accuracy and Competency:** Based on the following components of the job description; Displays attention to detail in completing tasks such as; registering patrons, answers reference questions and assists patrons in finding appropriate library material, and oversees property maintenance and management.  Demonstrates proficiency in assigned duties as outlined in the library manager job description in the areas of general and personnel administration. Provides funding reporting on library expenditures and needs.

   Employee response:

   Committee:


2. **Productivity and Planning:** Based on the following components of the job description; effectively undertakes and completes all required tasks according to the established deadlines. Assesses and develops new programs, establishes operational program objectives based on Board directions. Established ongoing plans for existing library activities. Provides and atmosphere of continuous improvement.

   Employee response:

   Committee:

3. **Communication Skills:**  Based on the following components of the job description; conveys and receives information accurately, appropriately, and in a timely manner and communicates the information to the Board and staff.  (Takes into account listening, speaking, writing, and public relations skills).

   Employee response:

   Committee:

4. **Attendance and Punctuality:** Based on the following components of the job description; is available in the library during assigned work hours, and reports planned absences in advance to the Chair or designate, or on the morning of any unplanned absences with work coverage arrangements.

   Employee response:

Committee:

5. **Dependability:**  Based on the following components of the job description; takes on and follows through on assignment and instruction, completes assignments on time, ensures the library has staffing for all hours of operation and manages the principal duties of the Library Manager.

Employee response:

Committee:

6. **Adaptability:** Based on the following components of the job description; accepts change well and adjusts to changing circumstances and displays initiative in learning new library technologies and resources.

Employee response:

Committee:

7. **Customer Focus:** Based on the following components of the job description; provides appropriate and polite responses to requests by patrons and others in a timely manner.
Employee response:

Committee:

8. **Technical Skills:** Based on the following components of the job description; continues to develop technological skills, maintains an awareness of emerging library services and resources.

Employee response:

Committee:

9. **Public Relations:** Based on the following components of the job description; promotes library services and resources and advertises events, hours, and programming well in advance through the Library Website, Town Website, and newspaper or other sites available.

Employee response:

Committee:

**Professional Development – Appendix C**

1.  What training or development activities have been taken over the past year?

2.  Are there any other activities that would help with maintaining technical and other skills for future career and personal development?

3.  What are your next year training and development goals?

Trochu Municipal Library

# Manager Evaluation (Appendix D)

# Manager Information

| Name | | | |
|---|---|---|---|
| Job Title | | Date | |
| Review Period | | | |

Ratings **Rating**

**Description for Overall Rating of Performance based on Job Description Competencies**

| *Score* | *Definitions* |
|---|---|
| **1. Unacceptable** | Does not meet expectations. Overall performance and demonstration are consistently below level expected. Needs significant improvement to meet expectations either in the |

| | performance of the job responsibilities and/or how the work is performed. |
| | An improvement plan must be developed, and the employee coached concerning the specific steps taken to meet expectations. |
| **2.Below Target** | The employee's performance has been mixed over the performance cycle. |
| | Overall performance fell below the level expected with some job responsibilities and expected results satisfactorily achieved while others were not. Opportunity exists for improvement/development to meet the expectations either in achievement or performance objectives or in consistency. |
| | An improvement plan must be developed, and the employee coached concerning the specific steps taken to meet expectations |
| **3. Meets Expectations** | Employee met expectations. Rating represents solid, competent performance. The employee has satisfactorily achieved the job responsibilities established within the job description and has met the goals of the last performance appraisal. The employee continues to progress in demonstrating all job competencies consistently in all situations. This employee should be informed of ways in which performance could exceed expectations. |
| **4.Above Target** | The employee can achieve higher than expected results on occasion. The employee has fully achieved their performance objectives and has exceeded expectations in some cases. With few exceptions, they consistently demonstrated all aspects of the job description. Acts as a role model to others. |
| **5.Exceptional** | Demonstrated superior performance. |
| | Overall performance consistently and significantly exceeded expected outcomes with no exceptions in practice. |

## *Ratings*

| | 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|---|
| **Job Knowledge** | ☐ | ☐ | ☐ | ☐ | ☐ |

Job Description -Duties and Responsibilities – Productivity – 2) General Administration and 3) Personnel Administration

*Comments*

| | | | | | |
|---|---|---|---|---|---|
| **Work Quality** | ☐ | ☐ | ☐ | ☐ | ☐ |

Job Description -Duties and Responsibilities- 1) To the TML Board

*Comments*

| | | | | | |
|---|---|---|---|---|---|
| **Attendance/Punctuality** | ☐ | ☐ | ☐ | ☐ | ☐ |

*Comments*

| | | | | | |
|---|---|---|---|---|---|
| **Initiative** | ☐ | ☐ | ☐ | ☐ | ☐ |

Job Description -Duties and Responsibilities – 4) Planning and 8) Other Functions

*Comments*

| | | | | | |
|---|---|---|---|---|---|
| **Client Awareness** | ☐ | ☐ | ☐ | ☐ | ☐ |

Job Description -Duties and Responsibilities – 6) Public Relations

*Comments*

| Dependability | ☐ | ☐ | ☐ | ☐ | ☐ |
|---|---|---|---|---|---|

| *Comments* | |
|---|---|
| ***Overall Rating***<br>(average the rating numbers above) | |

## *Employees Goals*

## *Manager's Goals:*

## *Verification of Review*

*By signing this form, you confirm that you have discussed this review in detail with your supervisor. Signing this form does not necessarily indicate that you agree with this evaluation.*

| Reviewer<br><br>Signature | | Date | |
|---|---|---|---|
| Manager<br><br>Signature | | Date | |

# Library Staff Evaluation (Appendix E)

# Library Staff Information

| Name | | | |
|---|---|---|---|
| Job Title | | Date | |
| Review Period | | | |

Ratings **Rating**

**Description for Overall Rating of Performance based on Job Description Competencies**

| *Score* | *Definitions* |
|---|---|
| **1.Unacceptable** | Does not meet expectations. Overall performance and demonstration are consistently below level expected. Needs significant improvement to meet expectations either in the performance of the job |

| | responsibilities and/or how the work is performed. An improvement plan must be developed, and the employee coached concerning the specific steps taken to meet expectations. |
|---|---|
| **2.Below Target** | The employee's performance has been mixed over the performance cycle. Overall performance fell below the level expected with some job responsibilities and expected results satisfactorily achieved while others were not. Opportunity exists for improvement/development to meet the expectations either in achievement or performance objectives or in consistency. An improvement plan must be developed, and the employee coached concerning the specific steps taken to meet expectations. |
| **3. Meets Expectations** | Employee met expectations. Rating represents solid, competent performance. The employee has satisfactorilyachieved the job responsibilities established within the job description and has met the goals of the last performance appraisal. The employee continues to progress in demonstrating all job competencies consistently in all situations. This employee should be informed of ways in which performance could exceed expectations. |
| **4.Above Target** | The employee can achieve higher than expected results on occasion. The employee has fully achieved their performance objectives and has exceeded expectations in some cases. With few exceptions, they consistently demonstrated all aspects of the job description. Acts as a role model to others. |
| **5.Exceptional** | Demonstrated superior performance. Overall performance consistently and significantly exceeded expected outcomes with no exceptions in practice. |

## *Ratings*

| | **1** | **2** | **3** | **4** | **5** |
|---|---|---|---|---|---|

| **Job Knowledge** | ☐ | ☐ | ☐ | ☐ | ☐ |
|---|---|---|---|---|---|

Job Description: takes registration of patrons, maintains files accurately, checks materials in and out, assists in collection, maintenance and repair, shelving and shelf reading when necessary

*Comments*

| **Work Quality** | ☐ | ☐ | ☐ | ☐ | ☐ |
|---|---|---|---|---|---|

Job Description: answers reference questions and assists patrons in finding appropriate library materials, enters information into library data base

*Comments*

| **Attendance/Punctuality** | ☐ | ☐ | ☐ | ☐ | ☐ |
|---|---|---|---|---|---|

*Comments*

| **Initiative** | ☐ | ☐ | ☐ | ☐ | ☐ |
|---|---|---|---|---|---|

Job Description: Keeps current in library services and programs through collaboration with Library Manager, is self- directed, attends workshops and seminars,

*Comments*

| **Client Awareness** | ☐ | ☐ | ☐ | ☐ | ☐ |
|---|---|---|---|---|---|

Job Description: maintains TML Website and other media sites, promotes public library awareness, provides effective and friendly interactions with patrons and public

*Comments*

| **Dependability** | ☐ | ☐ | ☐ | ☐ | ☐ |
|---|---|---|---|---|---|

Job Description: completes library business and cleaning duties under the direction of the Library Manager

*Comments*

*Overall Rating*
*(average the rating numbers above)*

## *Employees Goals*

## *Manager's Goals:*

## *Verification of Review*

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*By signing this form, you confirm that you have discussed this review in detail with your supervisor. Signing this form does not necessarily indicate that you agree with this evaluation.*

| Reviewer Signature | | Date | |
|---|---|---|---|
| Manager Signature | | Date | |

**Patrons of the Trochu Municipal Library Feedback Form - (**Appendix F)

**Please indicate your level of satisfactions concerning CUSTOMER SERVICE by completing the following statements**

1- **Strongly Agree**

2- **Agree**

3- **Neutral**

4- **Disagree**

5- **Strongly Disagree**

## *Ratings*

|  | 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|---|
| **Rating** | ☐ | ☐ | ☐ | ☐ | ☐ |
| **1.** Library Staff treat me fairly and without discrimination. | | | | | |
| **Rating** | ☐ | ☐ | ☐ | ☐ | ☐ |
| **2.** Library Staff are professional in their dealings with me. | | | | | |
| **Rating** | ☐ | ☐ | ☐ | ☐ | ☐ |
| **3** Library Staff are friendly and helpful. | | | | | |

| | | | | | |
|---|---|---|---|---|---|
| **Rating** | ☐ | ☐ | ☐ | ☐ | ☐ |
| **4.** Library Staff are interested in me and my needs. | | | | | |
| **Rating** | ☐ | ☐ | ☐ | ☐ | ☐ |
| **5.** Library Staff are knowledgeable | | | | | |

| | **1** | **2** | **3** | **4** | **5** |
|---|---|---|---|---|---|
| **Ratings** | ☐ | ☐ | ☐ | ☐ | ☐ |
| **5.** Library Staff provide quality service | | | | | |
| **Rating** | ☐ | ☐ | ☐ | ☐ | ☐ |
| **6.** Library Staff responds in a timely manner. | | | | | |
| **Rating** | ☐ | ☐ | ☐ | ☐ | ☐ |
| **7.** Library Staff are difficult to approach | | | | | |

If you have rated any of the above items as Disagree or Strongly Disagree, please explain why.

_____
_____
_____
_____

Is there anything the library staff can do to serve you more efficiently?

_____
_____
_____
_____