
Trillium Public Library



Policy Type:	Human Resources	Policy Number:	HR-05
Policy Title:	Staff Development and Performance Appraisal	Initial Policy Approval Date:	2011
		Last Review/Revision Date:	January 2023
		Year of Next Review:	2027

Employees' work performance and achievements contribute to the operational, and overall success of the library. Professional development allows employees to enhance their skills and meet the evolving needs of the library.

Acceptable work performance includes not only skills to perform specific tasks but also demonstrating interpersonal skills, computer and internet skills, customer service skills, and engagement in self-directed learning.

This policy replaces sections of the former Trillium Public Library Policy HR-11 titled *Professional Development, Performance and Discipline*, and provides a framework for staff development and training activities.

Section 1: Professional Development and Training

1. The Trillium Public Library supports the on-going education and training of all permanent employees through their participation at conferences, workshops and courses with designated funding in the annual budget.
2. All decisions will be based on the applicability of the education and/or training to the achievement of the Board's Strategic Plan. The CEO shall consider the employee's experience and job description, budgetary limitations, succession needs, and the employee's annual staff development goals which are set with employee input.
3. Employees may, on occasion, be required to participate in training or in-service education opportunities to ensure they are current with leading edge library practices. Employees shall be compensated for attendance at such training or education at their regular hourly rate of pay, with consideration made for travel time. Ongoing training and education may include in-service training on technology, readers' advisory, reference, cataloguing, customer service delivery, supervision and management, health and safety, and other best library practices.
4. Any employee who is interested in a specific job-related training or education session, workshop or conference must submit a written request two (2) months in advance. Shorter periods for such requests may be entertained based on availability of funds and scheduling implications. The training and/or education must be appropriate to the position or in keeping with the Library's projected succession needs. Following attendance, a report stating the benefits to the employee and/or to the Library may be requested. Sharing of the report at a staff meeting may also be requested by the CEO.
5. All applications for education and training opportunities should be discussed with the CEO prior to registration. Costs will not be considered if attendance is not approved by the CEO in advance.
6. To be reimbursed for expenses, employees must submit original itemized receipts (see HR-06 Payment for Job-Related Expenses).

Section 2: Performance Appraisal

While the term 'performance review' suggests a focus on the past, performance reviews also focus on on-going performance improvement and professional development. The policy and process ensure objective and fair decision-making regarding compensation within the pay grade, promotion, disciplinary action, and termination; and ensures that expectations and performance standards are met.

1. Initial evaluations must take place at the end of the first three (3) months of employment. A successful evaluation at this stage is necessary for continued employment and progression from probationary status. Ongoing evaluations may take place during the probationary period to assist employees experiencing problems and to improve their performance.
2. After the initial evaluations, the library has an annual performance review system which is designed to:
 - a) allow for open and ongoing communication between the employee and CEO or supervisor
 - b) align employee performance objectives with library goals
 - c) establish a clear understanding and agreement on job responsibilities and the competencies required to fulfill the job
 - d) allow for regular feedback on performance
 - e) determine what an employee needs to do, as well as the support needed to succeed
 - f) consider accessibility needs and individual accommodation plans
3. General guidelines to be followed:
 - a) the performance review is conducted in a formal and private setting
 - b) the employee is given advance notice of the review (including a copy of the appraisal form) to prepare a performance self assessment
 - c) the employee's strengths should always be acknowledged and good performance reinforced
 - d) weaknesses should be discussed and an action plan for development agreed upon
 - e) any conflicts or concerns of the employee with the review are documented
 - f) both the employee's and supervisor's comments are recorded on the review form
4. The direct supervisor shall be responsible for evaluating subordinates and the Board shall evaluate the Library CEO. For details on evaluation of the Library CEO see Trillium Public Library Policy HR08 titled *Board CEO Partnership*.
5. Should an employee choose to transfer to another position, a closing appraisal should occur prior to transfer, but no later than two (2) weeks after the transfer so that the annual appraisal can occur on the new position only.

HR-05 – Staff Development and Performance Appraisal(continued)

Appendix A: Annual Employee Performance Appraisal

(Note: This sample is taken from OLS resource titled, *Coaching for Service and Success: A Guide to Performance Feedback*, and is intended to show one option for a staff performance appraisal form.)

Employee: _____

Position: _____

Position held since: _____

Supervisor _____

Date of last completed review: _____ Date of this review: _____

Next scheduled review: _____

I. EMPLOYEE ACHIEVEMENTS

A. Based on previous year's goals and objectives:

B. Other achievements/ personal successes:

II. EMPLOYEE DEVELOPMENT PLAN

A. Goals and objectives for the forthcoming year:

B. Training and Development for the forthcoming year:

III. EMPLOYEE PERFORMANCE

A. Job Performance

1. Job Knowledge

Performs all parts of the job with minimum supervision.

☐ Exceptional ☐ Good solid performer ☐ Needs improvement ☐ Unsatisfactory

Keeps up to date on changes to routines and procedures.

☐ Exceptional ☐ Good solid performer ☐ Needs improvement ☐ Unsatisfactory

Comments:

2. Planning and Organizing

Plans and organizes work to complete tasks and assignments within acceptable time frames, and to assure the quality and accuracy of work.

☐ Exceptional ☐ Good solid performer ☐ Needs improvement ☐ Unsatisfactory

Comments:

3. Flexibility and Adaptability

Implements changes to routines and procedures with ease.

☐ Exceptional ☐ Good solid performer ☐ Needs improvement ☐ Unsatisfactory

Adjusts work routines to accommodate service priorities.

☐ Exceptional ☐ Good solid performer ☐ Needs improvement ☐ Unsatisfactory

Comments:

Appendix A: Annual Employee Performance Appraisal – Employee Performance (continued)

4. Initiative and Problem Solving

Takes responsibility for identifying problems and recommending workable solutions.

☐ Exceptional ☐ Good solid performer ☐ Needs improvement ☐ Unsatisfactory

Knows when to ask for help.

☐ Exceptional ☐ Good solid performer ☐ Needs improvement ☐ Unsatisfactory

Comments:

5. Accountability

Takes responsibility for safe and appropriate use and care of library resources, including materials, facilities, equipment, supplies, budgets and cash.

☐ Exceptional ☐ Good solid performer ☐ Needs improvement ☐ Unsatisfactory

Takes responsibility for quality and quantity of own work.

☐ Exceptional ☐ Good solid performer ☐ Needs improvement ☐ Unsatisfactory

Comments:

6. Teamwork and Co-operation

Offers help when needed.

☐ Exceptional ☐ Good solid performer ☐ Needs improvement ☐ Unsatisfactory

Keeps co-workers and supervisor informed on progress of projects, comments and suggestions from patrons.

☐ Exceptional ☐ Good solid performer ☐ Needs improvement ☐ Unsatisfactory

Shares information required by others for good job performance.

☐ Exceptional ☐ Good solid performer ☐ Needs improvement ☐ Unsatisfactory

Accepts team decisions.

☐ Exceptional ☐ Good solid performer ☐ Needs improvement ☐ Unsatisfactory

Comments:

General Comments:

B. Service to Co-workers and the Public

1. Service Orientation

Gives priority to requests for service and assistance from patrons and colleagues over personal work.

☐ Exceptional ☐ Good solid performer ☐ Needs improvement ☐ Unsatisfactory

Comments:

2. Respects Patrons and Colleagues

Shows respect for co-workers and patrons, open and receptive to different points of view.

☐ Exceptional ☐ Good solid performer ☐ Needs improvement ☐ Unsatisfactory

Resists value judgements about individuals and their information or reading choices.

☐ Exceptional ☐ Good solid performer ☐ Needs improvement ☐ Unsatisfactory

Comments:

Appendix A: Annual Employee Performance Appraisal – Employee Performance (continued)

3. **Courtesy and Approachability**

Speaks in a friendly manner to patrons and co-workers in person and on the telephone.

☐ Exceptional ☐ Good solid performer ☐ Needs improvement ☐ Unsatisfactory

Treats patrons and co-workers politely.

☐ Exceptional ☐ Good solid performer ☐ Needs improvement ☐ Unsatisfactory

Acknowledges patrons waiting for service.

☐ Exceptional ☐ Good solid performer ☐ Needs improvement ☐ Unsatisfactory

Demonstrates good listening skills.

☐ Exceptional ☐ Good solid performer ☐ Needs improvement ☐ Unsatisfactory

Comments:

4. **Information and reading services**

Demonstrates good knowledge of all areas of the collection.

☐ Exceptional ☐ Good solid performer ☐ Needs improvement ☐ Unsatisfactory

Keeps collection knowledge up to date.

☐ Exceptional ☐ Good solid performer ☐ Needs improvement ☐ Unsatisfactory

Recommends library materials and sources for information appropriate for individual patron needs.

☐ Exceptional ☐ Good solid performer ☐ Needs improvement ☐ Unsatisfactory

Confirms that provided services have met individual needs.

☐ Exceptional ☐ Good solid performer ☐ Needs improvement ☐ Unsatisfactory

Comments:

5. **Commitment to the library and the community**

Keeps up to date on community and library developments.

☐ Exceptional ☐ Good solid performer ☐ Needs improvement ☐ Unsatisfactory

Explains policies, services and library development plans and changes in a positive manner.

☐ Exceptional ☐ Good solid performer ☐ Needs improvement ☐ Unsatisfactory

Brings any personal or community concerns about the library to the supervisor.

☐ Exceptional ☐ Good solid performer ☐ Needs improvement ☐ Unsatisfactory

Comments:

6. **Handling Conflict**

Remains calm and objective in conflict situations.

☐ Exceptional ☐ Good solid performer ☐ Needs improvement ☐ Unsatisfactory

Comments:

Appendix A: Annual Employee Performance Appraisal – Employee Performance (continued)

IV. OVERALL PERFORMANCE

A. Overall rating:

☐ Exceptional ☐ Good solid performer ☐ Needs improvement ☐ Unsatisfactory

B. Supervisor's comments:

Note to Supervisor: It is essential that the overall rating shows the culmination of the individual ratings; in other words, that the overall rating is justifiable. Comments should explain the overall rating given. Feel free to attach additional supporting documentation, if appropriate.

Signature: _____

Position: _____

Date: _____

C. Employee's comments:

I have read and discussed this appraisal.

Signature: _____

Date: _____

D. Third Party Review (if applicable):

Comments:

I have reviewed this appraisal.

Name: _____

Position: _____

Date: _____