Connecting Staff Skills to Performance Reviews

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Good Morning and thank you for attending this lecture. This morning I will be presenting Connecting Staff Skills to Performance Reviews, a project at the University of South Florida Tampa Library. I hope that sharing our experience will be informative and may help others who are facing similar issues.

Conference Abstract: The University of South Florida (USF) Library initiated a task force to develop a listing of skills needed by staff personnel within the library. This task force was able to draw from several sources to recognize some core competencies needed within the library. This effort highlighted the need for the library to develop a correlation between these competencies and how staff members will be evaluated. The Performance Indicators document was developed to facilitate this. The last step of the task force was to translate this information into a program for evaluating staff, an on-boarding process for training new staff members and a plan for current staff members to become fully trained in the skills required for their job. This presentation will show the process the task force went through to develop these critical documents and discuss the experience of the management team to implement it. The discussion will cover the staff’s reaction to these programs. The successes and challenges of the program after 1 year of implementation will be presented with the goal of providing participants with the chance to see possibilities for using USF’s experience to help their libraries to develop their important staff resources.
First, I would like to introduce the team that help make this project a reality. My name is Dennis Smith and I am the Manager of Access Services at USF. The team that put together the work I will be presenting was called the Competencies and Skills Assessment Task Force. The short title was Core Competencies Task Force. We had three of the Managers at USF, Jessi Hurd, Manager of Technical Services, LeEtta Schmidt, Manager of Interlibrary Loan and myself. Our taskforce included the HR Coordinator for the Library, Nancy Jacobs-Dilley and a representative from the University’s Talent Management Department, Gabriella Harmon. The project began over a year and a half ago and we began implementation about a year ago. I will also be sharing the implementation of our work and reflection on this project.
The Task Force was charged with identifying skills and competencies for library staff. The issues the library faced were as long term employees retired, each job description and job posting had to be rewritten from scratch as many of these had not been update in many years. In addition, HR found that even though the University has some basic guidelines, the departments had very different job descriptions even with similar positions. In addition to this, the library lacked a formal on-boarding program. Our plan was to identify skills, staff responsibilities, training and evaluation of training. Other issues that surfaced evolved around employee evaluations. How many here enjoys writing Employee Evaluations? .... These other issues influenced some of the work we accomplished.
Initially, we identified four tasks that we would tackle. Which evolved around the skills lists and core competencies.

But as we began our work, we identified the need to address staff performance along with the other important areas. This is the part of the project that I will focus on today.
As we began our project, we developed a skills database to identify skills required in a department and across the library. We also developed questionnaires that could be used by supervisors and employees to evaluate their skill levels. This questionnaire is then compared a checklist to determine if the staff member requires additional training to bring their skill level up to the level identified in the checklist. Lastly, we used a university standard learning plan to facilitate the staff member achieving full competency in their position. Here are examples of this process.
The example here is of our skills list database. As we developed the skills list, we classified them by Skill Type. Then we identified the skill and assigned it to the Unit. Later in the process, we identified the level of each skill for each position in a different table.
Here is a sample questionnaire for an Access Services staff member and the supervisor. This questionnaire allows the employee to assess their level in each skill as well as the supervisor assessing the staff member’s skill level. We used a 0 to 4 scale as our model.
Using the skill listing combined with a tables that identify a department and the skill level required of a particular staff position. The example above shows a Library Assistant (LA) in access services. The report shows the skills need for that position and the level required after 6 months in the position and the level required after 1 year.
Here we see a sample of our learning plan that we developed in order to develop the staff member’s skills to the levels listed on the previous report.
At this point, we had our listing of skills so we began to focus on core competencies. This is where we began to expand and add some additional tasks to our task force.
As we conducted our research, particularly in Core Competencies, we examined programs within USF, other Universities, organizations and national programs such as the American Library Association’s and ACRL’s Core Competencies. We found that there has been extensive work done on Core Competencies for Librarians, but very few examples that focused on library staff. As we began to examine core competencies, we begun to realize the need within our organization to relate these competencies to employee’s performance and evaluation. We found very few examples of performance being related to skills or core competencies.

**Core Competencies Vs. Performance Indicators**

- Core Competencies
  - Focused more on Librarians
  - Mainly tied to vision documents

- Performance Indicators
  - Very few examples
  - Not related to skills or competencies
We started developing our core competencies from examples national organizations. One of our main sources of inspiration was a core competencies document from York University. It was this document’s organization of core competencies that lead us to see how we could organize competencies into the areas that staff are evaluated on.
Once we had this laid out, we began the task of developing this “master” document. We used the USF Evaluation to guide us in the areas to we would develop competencies. As we developed our documents, we began to draw in other departments and the library administration into our vision of a document that the library could use. We felt that we needed a document to guide us as a group without dictating how we evaluate each staff member. We also felt the need to bring up the skills and competencies of library staff that would be needed in the future for the library to be successful.

Core Competencies and Performance Indicators

- Identified the Competencies Areas
- Identified the Competencies
- Developed Performance Indicators
- Brought in Other Library Managers
- Worked with USF Human Resources
- Proposed to the Library Administration and Management
To illustrate, here is a copy of one of our evaluation pages which shows the Performance Indicators and examples of the ratings above.
Here is an example of our core competencies. If you notice our first core competency is taken directly from the Evaluation Form.
Here is an example of the Performance indicator for Job Knowledge. We did write summaries for all five ratings, but I’m going to keep this on a positive note. Our goal was to incorporate the performance standards listed along with a way to describe the expected performance for that rating. Overall we completed a document that covered 10 core competencies areas, eight of which are on the evaluation and an additional two that we proposed would be incorporated into the library’s evaluation system. The additional areas were Adaptability for all staff and Managing People which would relate to supervisors and staff with supervisory roles.
When we completed the development of this document, we were very concise about how we wanted to implement within the library. Our goal was to introducing for the remainder of the current evaluation cycle and prepare the library for it’s use during the following evaluation cycle.

Our first goal was to make sure we had complete buy-in from Management and the Administration that this is the direction we wanted to move in. Second, we began training the supervisors on this program and introduced it to the staff. In addition to the formal training, our departments conducted one-on-one sessions with each employee after they had an opportunity to read over the document.

Lastly, we also had additional workshops conducted by the USF Talent Management which involved dealing with change, performance self-assessments and supervisors training in the evaluation system. These were done to support the transition and begin our culture change.
For many of the managers, we felt that the transition went a lot better than expected. There were concerns raised but many of the staff appreciated the openness of the system.

Our first round of evaluations were challenging as many staff experienced an “adjustment” from their previous evaluations.

We did realize a sharp increase in the communication between supervisors and staff on issues of performance and skills.

Many people felt pain with this system, but the greater majority did feel a stronger fairness and engagement with the system.
Here are a few insights into our program after one year. When meeting with my staff members, none were surprised by their evals. This was mainly because it wasn’t the first time we had discussed their performance over the last year. Now staff have come to expect goals and feedback on a more regular basis.
**Conclusions**

**SKILLS**
Develop skills through training program

**CORE COMPETENCIES**
Achieve through utilizing skills

**PERFORMANCE**
Understand expectations and achieve personal goals
Some lessons we learned. Giving staff a goal often encourages them to achieve it. Staff want to know what you expect of their performance. Communication is the key.

Work as a whole library.
The task force developed the skills database and documents as an enhanced tool for library supervisors and manager. This will provide some shared agreement and standardization with the library and increase library communication. These tools will also provide inventories of staff skills to facilitate a competent workforce focused on achieving the strategic goals of USF and the Library while contributing greatly to student success.