

Performance Management Criteria and Ratings Matrix

Directions: These performance criteria and ratings apply to all Library Academic Professionals and Civil Service employees. Please use the matrix below to evaluate employees on the following 7 performance criteria using the ratings scale of Exceeds Expectations, Performing Successfully, or Needs Improvement. The examples provided at each level are intended to help you assess employees but are not exhaustive.

When selecting the performance rating, supervisors should use this general definition of the ratings scale, relying on their observations, judgment, and experience in determining which rating best applies to their direct report’s performance:

Exceeds Expectations: Employee consistently surpasses job requirements and expectations within the performance criterion, and demonstrates exceptional performance.

Performing Successfully: Employee meets the job requirements and expectations within the performance criterion, and provides reliable and effective results.

Needs Improvement: Employee’s work falls below the basic requirements for critical aspects of the performance criterion and needs to address specific areas to improve performance. As a result of this evaluation, the employee and supervisors will create a Needs Improvement plan with clear, measurable goals and designated training or other resources available to support the employee in developing the necessary skills.

Criteria	Description of Criterion	Exceeds Expectations (Examples)	Performing Successfully (Examples)	Needs Improvement (Examples)
Expertise Relevant to Position	Includes areas of job knowledge, exercising judgment, and decision-making. Continues to learn and expand skills and institutional knowledge	Possesses advanced knowledge to accomplish job duties and responsibilities. Consistently exercises good judgment, considering experience and the broader impact of decisions on people and situations. Successfully manages increased autonomy in decision-making for appropriate areas. Continually seeks professional development relevant to the position and applies it to their work.	Possesses essential knowledge to accomplish job duties and responsibilities. Exercises good judgment and decision-making skills with appropriate supervisor input. Demonstrates continued professional development and learning relevant to the position.	Needs increased skills, experience or training in required duties and responsibilities. Regularly requires supervisor guidance or review of judgment and decisions. Seldom requests continuing professional development or requests professional development that is not relevant to their position(*).
Professionalism & Integrity	Includes interpersonal skills, respect, conduct, interacting with others, inclusivity, and	Proactively connects with and engages others in a collegial, respectful and inclusive manner. Demonstrates polite and helpful behaviors to coworkers and	Engages others in a polite, respectful, and inclusive manner. Demonstrates helpful behaviors to coworkers and guests. Articulates opposing viewpoints	Does not appropriately engage with co-workers (such as contributing to unit meetings, committee work, team projects, or group tasks). Allows negative emotions to

	representing the University Library	guests and encourages similar qualities in others, including inviting dialog for difficult topics and conversations. Takes responsibility for their behavior and actions and sets an example for others in successfully resolving conflict. Uses active listening skills and provides constructive feedback and guidance. Creates opportunities to promote the University Library in a positive and relevant way.	in a respectful and constructive manner. Takes responsibility for their behavior and actions and conscientiously addresses conflict. Successfully represents the University Library when called upon in a positive and relevant way.	overly influence interactions with colleagues; is openly critical or dismissive of colleagues' abilities or ideas, or of the overall organization. Does not take responsibility for behavior and actions. Unsuccessfully represents the Library due to ineffective interpersonal communication (e.g., unprofessional behavior, lack of adhering to workplace norms and etiquette, escalating conflict, etc.)
Communication Skills	Includes sharing information through writing and speaking to different audiences based on job roles and responsibilities (for example, internal and external customers, patrons, vendors)	Shares information in a considerate, clear and effective manner, tailors communication to the audience (e.g., internal and external customers, patrons, vendors), channel, purpose, and timeframe to achieve desired outcomes. Anticipates information needs and provides additional, helpful resources and context when possible.	Clearly and effectively crafts communication appropriate to the audience (i.e., internal and external customers, patrons, vendors), channel, purpose, and timeframe. Addresses questions and concerns in a timely manner.	Fails to communicate fully, clearly and effectively. Struggles to adapt tone and content depending on audience (e.g., internal and external customers, patrons, vendors), channel, purpose, and timeframe. Fails to address questions or concerns in a timely manner; frequently ignores email and other communications.
Reliability	Includes meeting deadlines and getting work done, punctuality and dependability, and availability	Regularly produces a high quantity of work of value to the organization in a timely manner. Exceptionally dependable for fulfilling schedule and role commitments. Establishes a reputation for being a person who can be counted on in high priority or urgent situations. Is highly dependable when expected to be present and available.	Takes accountability for accomplishing work in a timely manner and following through on tasks, goals, and/or assignments. Can be depended upon to punctually fulfill schedule and role commitments. Is accountable for being present and available when expected.	Fails to accomplish required quantity and quality of work in a timely manner. Does not follow through on tasks, goals and/or assignments. Is not present or available as expected. Lacks punctuality to fulfill schedule and role commitments.
Adaptability & Effectiveness	Includes flexibility and ability to navigate and accommodate change, staying productive in meeting changing	Uses self-awareness of strengths and weaknesses for the good of the organization to help impact change. Is very open and adaptable to change; is called upon to help champion change	Seeks feedback to improve self-awareness of strengths and weaknesses. Can manage changing priorities, goals, tools, processes, systems at the unit and organization	Does not act on feedback about strengths and weaknesses. Rejects opportunities to engage in new initiatives or requests for assistance. Is openly negative to proposed or actual change to the point of being

	organizational goals and needs	and help others identify new opportunities. Proactively researches upcoming changes within their field or the institution and shares information with their team. Consistently produces desired results or contributions at a level greater than expected or ahead of schedule.	level with a growth mindset and stay appropriately informed of changes within their field and the institution. Is capable of producing a desired result or contribution in a designated timeframe.	counterproductive or inhibiting progress towards unit or organizational goals. Fails to stay informed of changes within their field and/or the institution. Does not produce desired result or contribution within designated timeframe.
Collaboration	Includes working cooperatively and contributing to groups of people and with other individuals based on job roles and assignments	Works in a cooperative and collaborative manner. Provides constructive criticism, alternatives and feedback. Seeks opportunities to build relationships with others and encourages colleagues and team members to collaborate to support successful outcomes.	Works in a cooperative manner. Provides constructive criticism and alternatives. Welcomes opportunities to work with others. Actively participates and positively engages with colleagues and team members to support successful outcomes	Does not work cooperatively with others. Provides criticism without constructive alternatives. Rejects opportunities to collaborate with others and/or fails to work successfully with colleagues to move projects or activities forward to completion.
Initiative & Leadership	Includes creativity, innovation, problem-solving, and leadership. If applicable, includes supervisory skills.	Models leadership in appropriately and consistently initiating and taking charge of work (projects, tasks, activities, etc.) and resolving issues without being prompted. Exemplifies emotional intelligence, demonstrating empathy and self-awareness. Actively seeks and graciously accepts feedback. Thoughtfully, consistently, and proactively displays creativity in problem solving and generating new ideas that align with unit and organization needs. Identifies and implements innovative strategies that support the Library or institution's mission and goals. (If applicable) Provides clear and constructive	Will begin and take charge of work (projects, tasks, activities, etc.) and resolving issues when asked. Displays creativity in problem solving and generating new ideas that align with unit and organization needs. Demonstrates awareness of the Library and institution's strategic initiatives and mission. Uses expertise for the organization's benefit. (If applicable) Provides regular, clear and constructive feedback to direct reports and supports their professional development. Addresses issues as they arise and maintains a positive work environment.	Is not able to begin or take charge of work (projects, tasks, activities, etc.) or resolve issues without supervisor follow-up. Is unable to generate new ideas or approaches to solve problems or explore new ways of meeting unit and organizational needs. Resists process improvement opportunities and fails to support or align work with Library or University mission/strategy. Despite expertise in their field, shows little interest in utilizing it for the organization's benefit. (If applicable) Provides insufficient, vague, and/or unconstructive feedback to direct reports. Does not adequately support team members' professional growth. Fails to address issues as they arise and needs to

		feedback and coaching to encourage and help develop their employees. Skillfully addresses conflicts and sustains a positive and motivated team environment.		improve conflict resolution skills and team morale.
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(*) Investigation Time for Academic Professionals and Civil Service Professionals should not be evaluated by the supervisor with this tool as it is an optional professional development opportunity. See [Investigation Time Policy](#) for more details.