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A *PASport* to Service Quality:

Developing a Performance Assessment System

Part 2: The Centennial
Library *PASport* System

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Part 1 of this article discussed the current service quality environment in which academic libraries find themselves operating, and the challenge for staff performance assessment as an integral element of maintaining and improving effective service quality levels. As referenced in Part 1, Millson-Martula and Menon in a 1999 article in College and Research Libraries suggest that "no effort to enhance customer satisfaction will succeed unless students and faculty are convinced that library staff, as service providers, care about the quality of service they provide and the manner in which they do it. However, library staff will not demonstrate a high degree of commitment and caring unless they believe that library management cares about the staff as well. Simply put, customer satisfaction equals employee satisfaction." [Millson-Martula and Menon, p.46]. It is difficult to separate employee satisfaction from appropriate performance assessment.

But this performance appraisal must be found in the context of a larger effort which includes staff interpersonal understanding (connection), service evaluation, personal and professional development opportunities, and appropriate recognition. Without those, performance assessment alone could appear to be punitive. It is in this broader context that the performance assessment system, *PASport*, was developed at the Centennial Library.

The PASport System

A critical part of the evaluation element of the staff development effort at the Centennial Library is the *PASport* Performance Assessment System. The *PASport* acronym was selected because a *passport* is defined as "anything that enables a person to be accepted, admitted, or successful." That seemed like a worthy focus for our performance assessment system. The

System was created in 1999, followed by a thorough presentation to and review by the Library faculty and staff. After the first round of assessments, revisions were made to the system, to the forms used, and to the timelines. Our experience suggests the importance of a number of preliminary actions necessary for effective implementation:

- Assure that before the process begins all job descriptions are up-to-date, accurate, and complete. We have been doing an annual job description review for a number of years, but in this case we asked every faculty and staff member to review each job description and, in consultation with the supervisor, make all appropriate changes. This document then becomes one benchmark for assessment.
- Thoroughly and fairly introduce the system to the staff along with all the documentation and forms. It is wise not to present the system in pieces as it is being developed, but as a comprehensive package. In addition, make it clear that, at the first introduction, staff interaction and input is welcome. Early revisions to the process might be necessary and likely.
- Thoroughly and accurately document all elements of the process in writing. Gentleman's agreements and unwritten traditions are not appropriate ways to address good performance assessment. Stick with the script!
- Present a commitment to performance assessment, but make sure that staff members understand that the elements of the process are not etched in stone. There will be a regular review of the process including staff input. Demonstrate a commitment to fixing the system should that be necessary, but assure them that it is here to stay.

- Make it clear that a significant part of the system includes an investment in staff development and recognition. Although we would love to have altruistic staff members, we must acknowledge that staff must see something in the assessment system personally for them. Rewards and attention are important.
- Remind staff of the broader context of assessment and the connection between their evaluations and the effectiveness of the Library in delivering quality service to its users. The team needs to work together for the good of the whole.
- Improving the effectiveness of the Centennial Library in achieving its mission and goals through a continual development of all faculty and staff members.
- Helping all faculty and staff members to grow and improve in their present job assignments, in self-development, and in setting appropriate goals for future growth.
- Providing all faculty and staff members with an assessment of the quality of their performance.
- Strengthening communication and understanding between faculty and staff members and their supervisors or subordinates.

The Purpose of the System

In addition to its direct connection to service quality, performance assessment of all employees in an organization is essential for good personnel management and planning. Without regular and frequent appraisal, any employee – faculty or staff – cannot place his or her performance in perspective with the expectations of the immediate supervisor or the organization as a whole. There are other factors which suggest the value of more frequent appraisals. Carol Goodson, in her book discussing performance standards for library personnel, recommends assessment annually, if not more often, because “in today’s work climate, job responsibilities and institutional needs can change quickly, and it is only fair that employees be evaluated for what they are really doing, not for what they were supposed to be doing before altered circumstances intervened.” [Goodson, p.11]

In the *PASport* system, fulfillment of assigned duties and responsibilities is only one of the measures upon which each employee is rated by supervisors or subordinates. Other criteria involved in evaluating performance include progress toward completing established goals and objectives, and the evidence of initiative to take advantage of opportunities for personal and professional growth. The objectives for the *PASport* system include:

The system, then, is designed to accomplish several things. It allows for regular interaction and communication about work and the quality of service, for reviewing work responsibilities and updating job descriptions, for focusing on staff development needs, and for surfacing service quality issues.

The Elements of the System

The Annual Process. The elements of the system for Library staff include performance self-assessment, performance assessment by the immediate supervisor, and the annual evaluation and preparation of Personal Work Development Plans. The performance assessment also includes job description review and revision.

The performance self-assessment requires that Library staff members evaluate their performance on each item in the job description. As well, they are asked, in reviewing the job descriptions, to suggest revisions necessary to reflect changes in duties and to outline any challenges encountered in carrying out those responsibilities. The second part of the assessment involves a personal work review including items like work output, cooperation, adaptability, and development. The immediate supervisor completes the same process using the same form. Thus the performance assessment interview involves a reconciling of

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the views of both on the performance of the staff member.

A critical part of an effective performance assessment system is the creation of performance, professional, and development goals. "A performance appraisal system that emphasizes planning through the establishment of performance goals and objectives is much more effective than one that focuses on just appraisal. A careful plan, developed jointly by the supervisor and the staff member, is critical to effective performance and an accurate appraisal of that performance. Staff involvement in the formulation of goals and objectives is important for individual motivation and commitment. As supervisors in libraries become more removed and less knowledgeable about the details of the work performed by staff, the staff have more direct and accurate information about work requirements. Commitment develops through active participation in setting goals and objectives." [Stueart and Sullivan, p.53]. Thus, each Centennial Library staff member and faculty member completes an evaluation of the previous year's Personal Work Development Plan, and in consultation with the immediate supervisor, revises that plan and prepares specific goals for the following year. Those who are supervisors have the additional responsibility of establishing and evaluating development goals for their areas of responsibility. These development plans are then completed and submitted to the immediate supervisor, discussed and revised, and passed on to the Director of Library Services, who reviews them with each department head.

Every two to three years, a supervisor evaluation is scheduled. This provides an opportunity for supervised employees to evaluate the performance of their immediate supervisor. The Administrator Evaluation Forms are submitted to the department head of the supervisor, or in the case of department heads, to the Director of Library Services. Statistical

summaries of the results and summaries of the comments are then shared with the supervisor being evaluated and conclusions reached about any actions that need to be taken. Results are also shared with the department staff in the absence of the department head.

Department heads are reviewed by the Director of Library Services. This evaluation session includes a review of the Personal Work Development Plan of each, a discussion of current personal work priorities and current department priorities, a consideration of areas of concern for the coming academic year, and a consensus on issues on which assistance is needed from the Director.

The Evaluation Session. To assist department heads, the performance assessment interview is directed by an Evaluation Session Guide which provides evaluative questions, discussion points, and directions. As well, an annual process calendar describes the steps in the process and the target dates. This calendar generally runs from March through May. During that time the process is reviewed, assessments are completed, assessment interviews are held, and reports on each Library staff and faculty member are prepared by the immediate supervisor.

Performance Assessment reports. At the completion of all the evaluation sessions, department heads are asked to prepare a performance assessment report on each faculty and staff member. This report includes a copy of the performance assessment, a copy of the personal work development plan, and a brief written summary which might include some or all of the following:

- Review of the assessment results
- Actions to be taken as a result of the review
- Proposed job description revisions
- Comments on the Personal Work Development Plan
- Staff development needs and plans

These reports are submitted to the Director of Library Services who reviews the results with each department head. Consensus is then reached on actions to be taken, staff development needs to be addressed, and adjustments to be made in the process.

The Review of Results. During the performance evaluation of the department heads, the report for each library faculty and staff member is reviewed, with implications for job responsibility adjustments, staff development needs, or Personal Work Development Plan revisions. Suggestions for wage adjustments are also considered for inclusion in subsequent budget requests.

The discussion of the results also includes a review of the entire performance assessment process, using input from the faculty and staff who have been evaluated. That review has led to changes in the forms, adjustments in the evaluation scale, and alterations of the calendar of the performance assessment activities.

An Appeal Process. We have chosen not to include an appeal process specific to the *PASport* system. The University has a comprehensive and manageable Grievance Policy which can be activated should a Library employee feel that the assessment adversely affected employment status. The University policy procedures are appropriate for application to any concerns which could result from the *PASport* system reviews.

Future Additions. The recent discovery of the concept of 360-degree evaluation has led to considering the addition of peer evaluation to the performance assessment system. This approach to assessment would result in a system that includes self-evaluation, supervisor evaluation (top-down), subordinate evaluation (bottom-up), and peer evaluation (side-to-side). Peer evaluations are a touchy subject and open to the abuse of fellow employees with axes to grind. "Since childhood we have all been indoctrinated against becoming a 'tattle-

tale.' For most children, the worst thing you can be accused of is telling on your friends (although telling on your siblings is OK!). On the other hand, who knows more about the work of others than those who work with them." [Goodson, p.37] This type of evaluation can be another potential mine field for supervisors, but it can provide a perspective on performance not available through the other forms of assessment. Though an intriguing concept, we are not yet prepared in the early stages of implementing *PASport* to consider the addition of peer assessment.

The Experience with the System

Our experience with the *PASport* system is based upon completing three cycles of the entire process and one cycle of the supervisor performance assessment. Please remember, "improving performance management systems often requires a culture change that cannot be achieved in a year or by a redesign of the procedures and forms." [Saunier & Mavis, p.4] We have seen positive benefits from the system, but there are continuing challenges requiring sensitivity.

Benefits. It would seem that the benefits of effective performance assessment and management would be obvious. Steve Morgan in his book entitled Performance Assessment in Academic Libraries suggests five benefits of regular appraisal: improved service quality, improved individual performance, enhanced communication, increased motivation, and individualized planning in harmony with organizational goals. [Morgan, pp.121-122]. We are beginning to see some of these benefits as the result of *PASport*. However, our recent experience has suggested the following benefits.

- The system has generated more constructive discussions about job performance and service quality.
- The system has resulted in addressing job responsibilities that were uneven and

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sometimes unfair as a result of the rapidly changing technological environment.

- We have observed an increase in the number of positive comments on Library user surveys about the quality of staff service, and the survey scores about the service of the Library faculty and staff, both on the local surveys and on LibQUAL, remain very high.
- We believe that knowing that face-to-face evaluations are coming every year has put positive pressure on supervisors to confront problems early; thus low ratings during the evaluation session don't happen without previous interaction and an opportunity for improvement. Surprises are no fun both ways!
- Staff members are thinking about their jobs and responsibilities in different ways, not just as tasks to be completed, but also as a continuing process of development, both personal and functional. There needs to be a sense that we are going somewhere together.

Challenges. Our performance assessment system has its share of continuing challenges. Among these are the following:

- Managing the time-consuming nature of the process. Scheduling, timing, and deadlines must be established carefully to assure that the process does not become onerous. Dana Rooks in her book about motivating library staff says it well. "When multiplied by the number of employees an individual manager may supervise, the time commitment can be substantial. If supervisors view this process as an intrusion on their schedules, the appraisals will be completed as quickly and perfunctorily as possible. As a result, even a well-designed system becomes totally useless as a source of valuable information for the employee, the supervisor, and the organization. In this case, organizations must establish a high priority for the appraisal process and successfully convey to supervisors the importance and value which is being placed on the process at the organizational level." [Rooks, p.95]
- Getting staff to see performance assessment

as just one part of the staff development effort from which they all benefit.

- Overcoming the us-versus-them mentality inherent in the performance assessment environment. Adding supervisor assessment, allowing employees to evaluate their supervisors, can help to balance those perceptions.
- Making the process constructive and edifying rather than divisive.
- Getting an even and comprehensive approach to the process from those responsible to complete the assessments. Some managers are more comfortable with these tasks than others.
- Attaining a consistency of performance ratings across the departments. Supervisors have a range of skills in their ability to complete the assessment, the evaluation interview, and the written report.
- Making sure that the numbers in any evaluation instrument are easily explained and consistently applied. We have already reviewed them once and made some revisions. Numbering schemes must be perceived as fair.

Whatever you start, be sensitive to the regular revisions needed in the process, but stay with the program. Because of the time involved annually for the system to be effective, and because of the sensitive nature of the process for all involved, you will find it tempting to eventually stop doing it. "The performance management process requires constant attention. Plan for continuous improvement and not 'this year performance management, next year something else.' In truth, this business process will never be 'fixed' or even operate at an optimum level. But when the right concepts and skills are embedded in the way the organization and its people conduct business, you will see better performance." [Saunier & Mavis, p.4] The benefits of performance assessment will far outweigh the challenges, but flexible perseverance will be required to make the effort effective, assuring that staff have a valid *PASport* to service quality. †

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