

MAKING THE PERFORMANCE EVALUATION PROCESS WORK FOR YOUR ORGANIZATION



Presenter: Terry Kirchner, Executive Director,
Westchester Library System

December 5, 2025 – Gather & Grow

Agenda



- Discuss the origin of performance evaluations - WHY
 - Explore different types of performance evaluation systems - WHAT
- Develop a performance evaluation system that works well in your work environment - HOW
 - Questions!



WHY EVALUATE?



2 Basic Whys



Motivation



Ranking

Post Civil War, the
U.S. government
led the movement



1883 Pendleton Act / Civil Service Act:
attempted to provide a merit-based
promotion system to end favoritism

1935 Uniform Efficiency Rating System established

Used a 5-point rating scale to reflect:

- Quality of performance
- Productiveness
- Qualifications

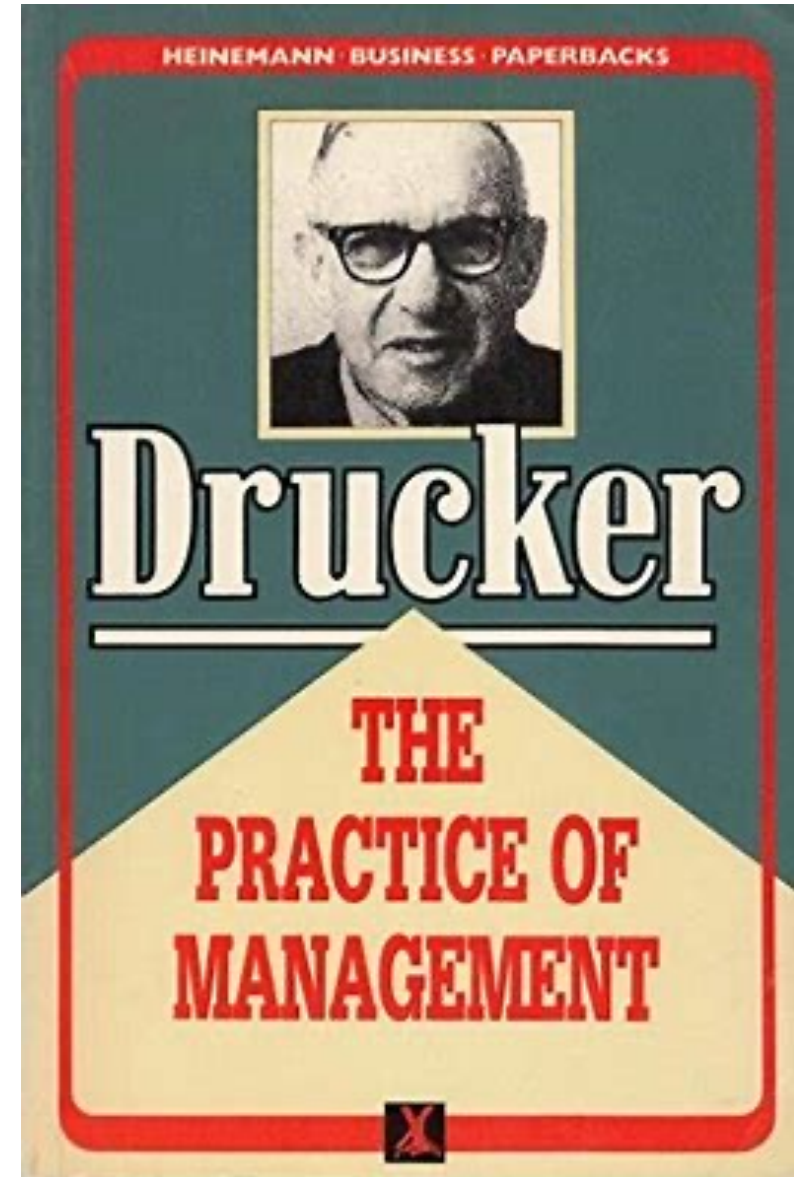
1950 Performance Rating Act



Established 3 summary rating levels:

- Outstanding
- Satisfactory
- Unsatisfactory

1954
PERFORMANCE
EVALUATIONS GO
MAINSTREAM



Management by Objects (MBO) SMART Goals



Specific



Measurable



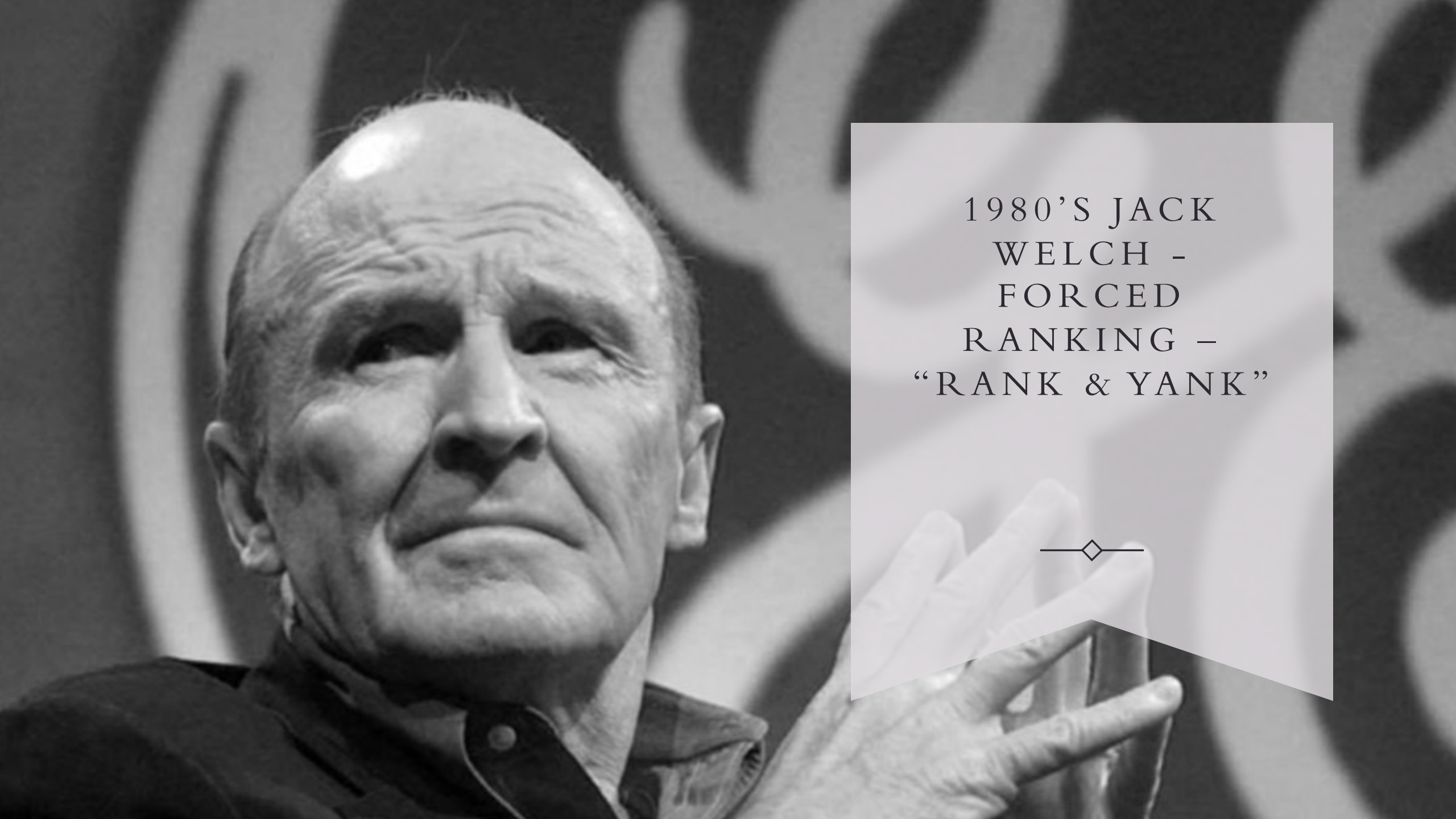
Achievable



Realistic



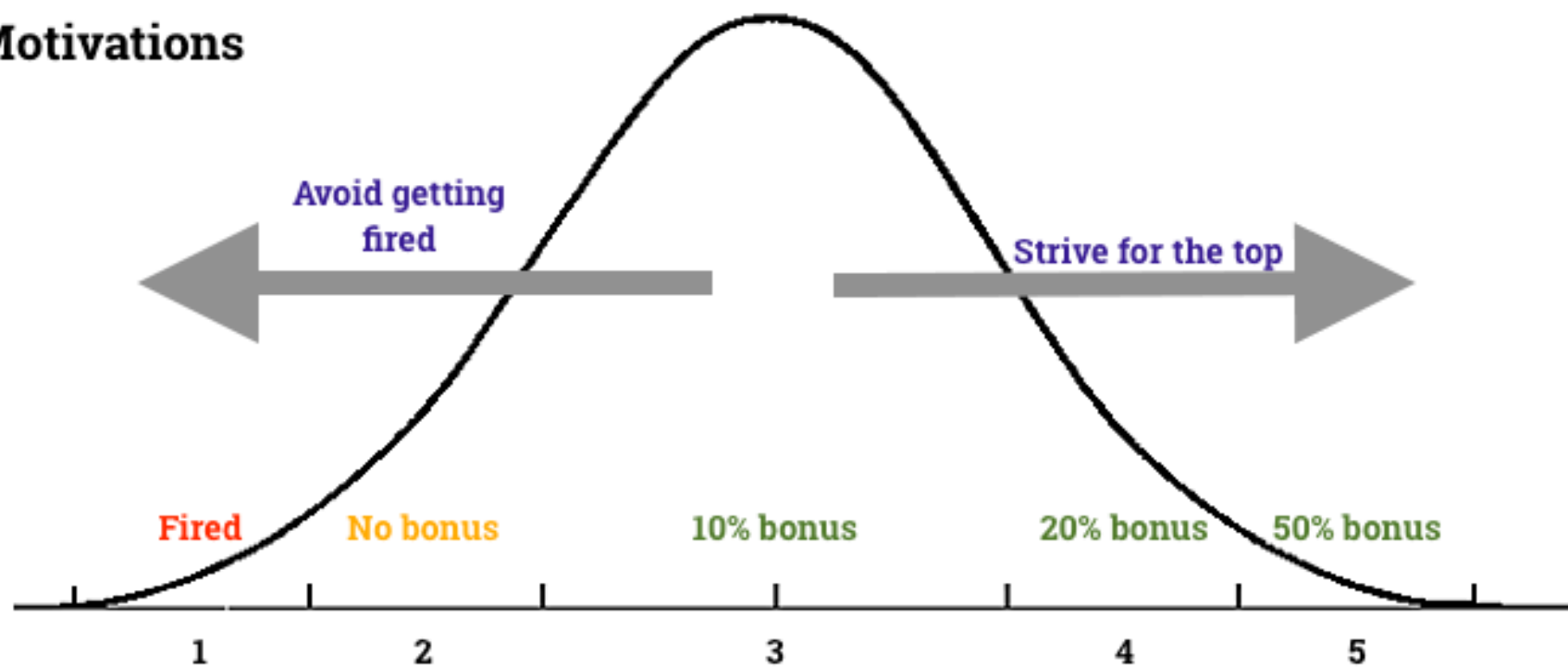
Time-bound

A black and white photograph of Jack Welch, an older man with a balding head and a serious expression, looking slightly upwards and to the left. He is wearing a dark jacket over a collared shirt. His hands are visible in the lower right, gesturing as if speaking. The background is blurred, showing large, curved shapes.

1980'S JACK
WELCH -
FORCED
RANKING -
“RANK & YANK”



Motivations



2010
PERFORMANCE
EVALUATIONS
WITH A MORE
INFORMAL
APPROACH



GET RID OF THE PERFORMANCE REVIEW!

How Companies Can
Stop Intimidating, Start
Managing—and Focus on
What Really Matters



SAMUEL A. CULBERT
with **LAWRENCE ROUT**

Informal Approach to Performance Evaluations



Less emphasis on the past
performances and more
focus on the current
activities and future
directions

Ongoing conversations

WHAT TO EVALUATE?



“What” are core elements to use in the evaluation



What is the “end game” – the Why?



Motivation



Ranking

Management by Objects (MBO) SMART Goals



Specific



Measurable



Achievable



Realistic



Time-bound

SMART goals work well with



ACTIONS



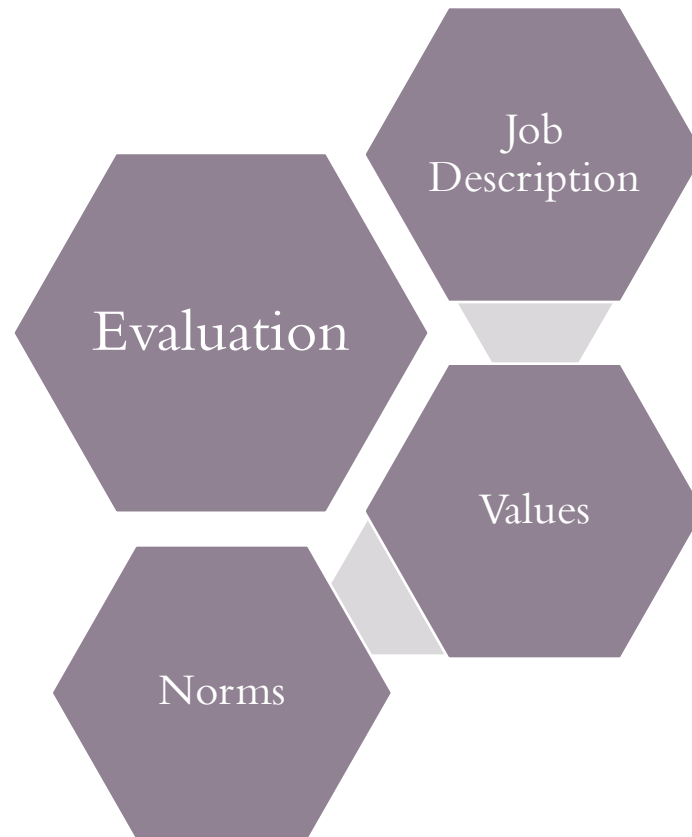
SMART goals are often used to measure
movement towards a higher goal

Likert scale approach



Task	Unsatisfactory	Need Improvement	Meets Expectations	Exceeds Expectations
Interpersonal skills				

Likert scale works very well with...



BEHAVIORS



Likert scales are often used to measure past behaviors and outcomes

Informal Approach to Performance Evaluations



CURRENT
ACTIVITIES



FUTURE
DIRECTION



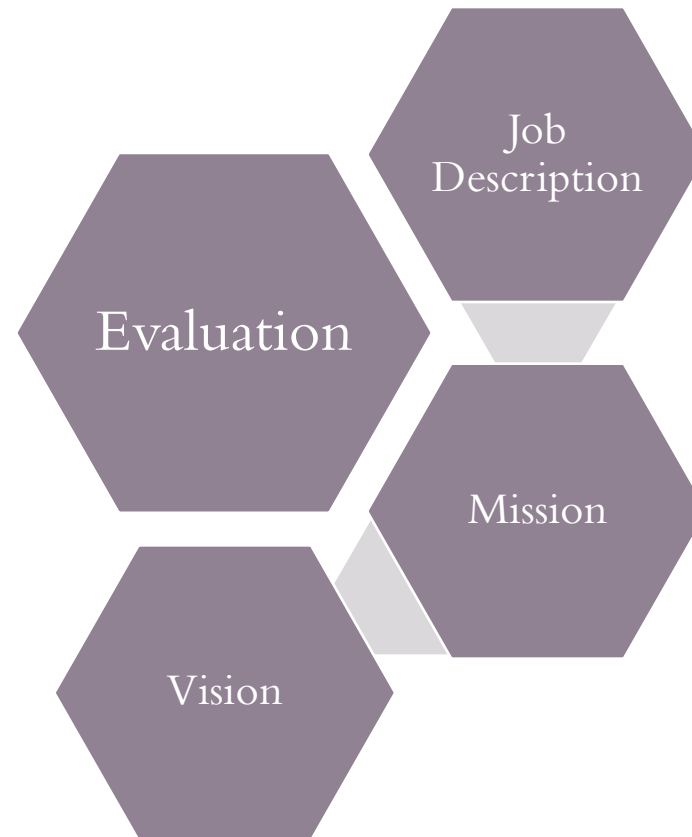
ONGOING
CONVERSATIONS

ELEMENTS OF THE INFORMAL APPROACH



<i>Move from:</i>	<i>Move towards:</i>
Annual review	Continuous previews & reviews
Past orientation	Present and future orientation
Hierarchical power / Power over	Shared power / Power with
Fear-based relationship	Trust-based relationships
Boss-dominated monologues	Two-sided conversations
Competitive environment	Team environment
Merit/ranking based pay	Market-based pay

Informal approach works well with



HOW TO EVALUATE?



Know your “WHY”



Motivation

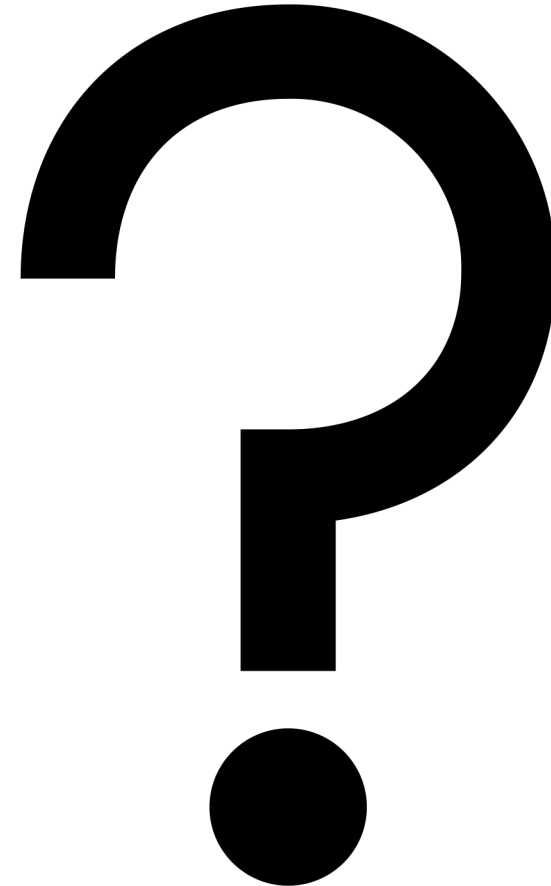


Ranking

Be clear on “WHAT” you are evaluating



UNDERSTAND HOW
THE EVALUATION
PROCESS IMPACTS
THE EMPLOYEES
AND THE
ORGANIZATION



HOW DO I CREATE AN EVALUATION TOOL?



SMART goals and evaluation template



Specific	Measurable	Achievable	Realistic	Time-bound	Complete?
Increase e-book circulation by 20% in 1 year	Increase by 20% from current level	Assess the required funding and staff support	E-books are growing in popularity elsewhere	1 year: Dec. 31	<input type="checkbox"/> Yes <input type="checkbox"/> No

Likert scale with emphasis on job functions

https://guides.mblc.state.ma.us/ld.php?content_id=79332530

Please rate the Library Director in the following areas using the above scale 5 (highest) to 1 (lowest) or N/A (Not Applicable) where appropriate:

1. Preparing and Managing the Budget

- ☐ Necessary work is completed in a timely manner prior to presentation to the Board.
- ☐ The budget covers all necessary expenses.
- ☐ Funds are allocated or reserved for unanticipated contingencies.
- ☐ Funds are effectively allocated.
- ☐ Mid-course corrections are minimized.
- ☐ ARIS (August) and State Aid (October) reports are accurate and complete and submitted to the MBLC in a timely manner.
- ☐ Other funding sources are explored and applied for as appropriate.

Comments:

Likert scale, comments and discussion section

<https://www.ala.org/sites/default/files/united/content/trustees/orgtools/RHPL-director-eval.doc>

Goals and Objectives

- _____ Provides leadership in developing long and short-term goals to accomplish mission of library.
- _____ Keeps the Board updated on implementation of library goals and objectives.

Comments: Goals and Objectives

Discussion

What are the three major strengths of the Director?

Are there limitations in the Director's performance?

In the past year, what difficult issues has the library faced and how did the Director bring them to resolution?

Informal approach to evaluation

- Regularly scheduled meetings are important – weekly, monthly, quarterly
- Open-ended questions – avoid yes/no responses
- Remain objective and empathetic to the other person's observations and experiences

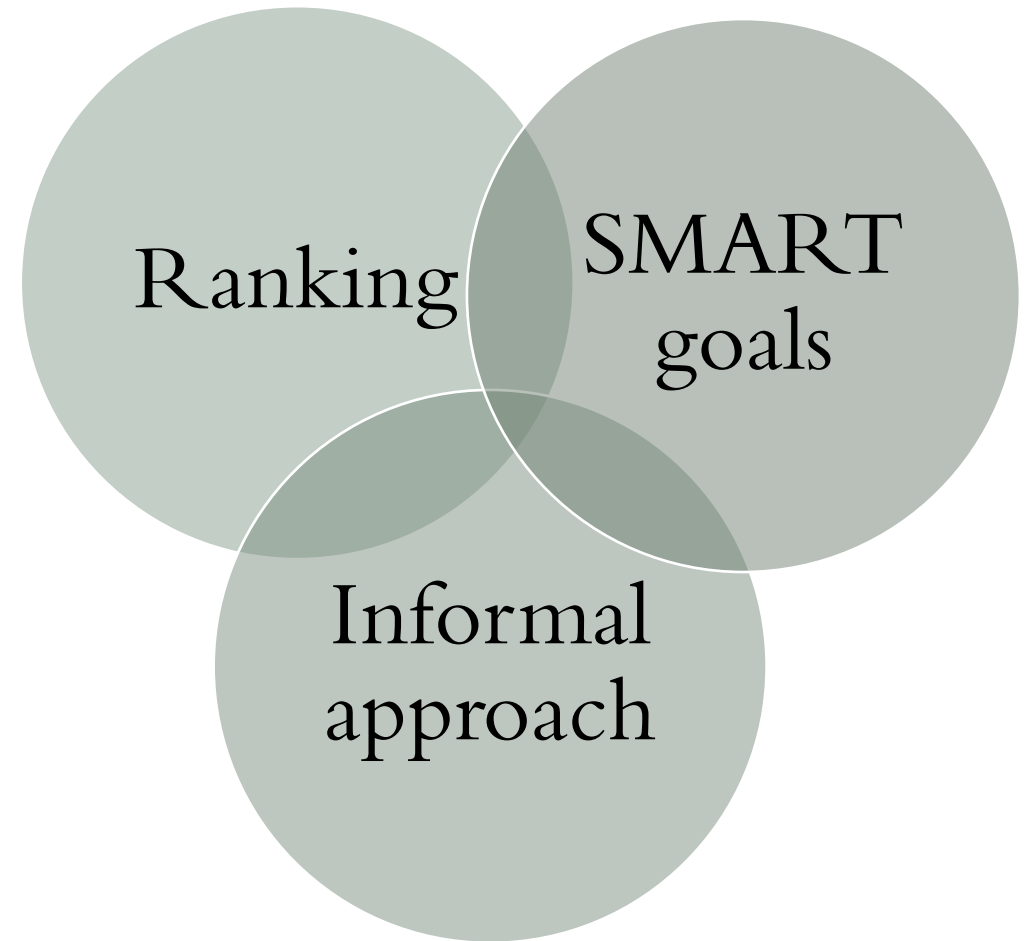
When we reviewed your job description last year, we identified growth in e-book circulations to be an organizational priority. In what ways do you see your efforts contributing to that growth?

What aspects of our current practices would you change based on what you have learned over the past quarter? What aspects of these changes are within your control if we moved forward with them?

THE BIG SECRET OF EVALUATION?



No one system is perfect. You can create a system based on your organizational culture and an employee's preferences.



What ingredients are most often missing in the evaluation process?



COMMUNICATION



CLEAR
EXPECTATIONS



TRUST



RESOURCE
ALLOCATION

THANK YOU!



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