

Sample Performance Management Documentation

A performance management system is crucial for creating positive work environment that helps employees achieve their goals and achieving success as an organization. Effective performance management is not simply an annual activity, but rather a process that provides continuous support and regular feedback — both positive and constructive.

LiRN recommends that Associations adopt a performance management approach that allows the employee and the association to collaboratively:

- Identify areas for development
- Set [SMART goals](#) that align with their personal goals, the Association's goals, and LiRN's overall strategy for the network
- Encourage and support people to grow
- Provide actionable feedback

LiRN presents the following Performance Management Guidelines to assist Associations in developing a performance management process that meets the above goals. LiRN acknowledges that many Law Association employers already have in place well-functioning employment practices that include a performance management process. This process and the related documentation are not intended to replace such practices.

Performance Management Guidelines
<p>Continuous and regular feedback</p> <ul style="list-style-type: none"> • Both positive and constructive.
<p>Annual goals</p> <ul style="list-style-type: none"> • LiRN recommends using SMART goals: Specific, Measurable, Achievable, Realistic and Timely). • Goals should be set collaboratively and align with the employee's personal goals, the Associations goals, and LiRN's overall strategy for the network. • The goals should be recorded in written format (a sample form can be found here. However, it is important to note that the goals can and should be revised as necessary.
<p>Mid-Year Check-In</p> <ul style="list-style-type: none"> • In addition to continuous and regular feedback, LiRN recommends that the employer and employee meet for a face-to-face review of the goals, discuss ongoing progress, provide feedback, and re-assess the priority or relevance of the goals.

Performance Management Guidelines

Salary Review

- LiRN requires that each library submit its budget for the following year, including provision for COLA increases and performance-based raises, in early June. Although this is early in the year, it is necessary for LiRN to be able to incorporate the libraries' budget requests into its own budget to be submitted to the LSO.
- Performance-based salary increases (over and above cost of living increases) should be supported by a business case during the budget process. A general business case template can be found [here](#). In the case of a performance-based salary adjustment, the business case should include details about the individual's performance review, including the overall rating.

Performance Review: Self-Assessment and Employer Assessment

- Both the employer and employee should have a current copy of the employee's position description to refer to in drafting their assessments.
- The employer should provide a self-assessment form to the employee to be returned 1-2 weeks in advance of the Performance Review Meeting. An example form can be found [here](#).
- The employer should familiarize her/himself with the employee's self-assessment in order better to complete their employer assessment. An example form can be found [here](#).
- The individual providing the review on behalf of the employer may be the Law Association President, the Law Association's Library Committee and/or Library Committee Chair, or, the Librarian responsible for personnel management.

Performance Review Meeting

- Once the employer and employee have each completed their Performance Review forms, a Performance Review Meeting should take place between them to discuss the forms.
- Allow an hour for this face-to-face meeting.
- It should be an honest and candid two-way communication in which the employer's performance review is related to the employee's description of their performance and the employee's position description and goals. Skills, competencies and developmental needs should be discussed by both the employer and the employee.