Making Peace with the Annual Performance Review

With a sigh, I click to submit my 2013 Faculty Annual Report, a.k.a., annual performance assessment. In many ways I agree with Robert Sutton, professor and organizational psychologist at Stanford University, who commented that an annual review is “this weird form you fill out every year that has nothing to do with real life.” Professor Sutton’s assessment is particularly apt for law librarians who frequently use assessment forms designed for use by nonlibrarians or teaching and research faculty.

Over the years I have made peace with the annual assessment process. That peace results, in part, from the fact that I manage the process throughout the entire year. I know the annual form and how to describe my work to fit into the proper boxes. Throughout the year, I use a simple Word document to capture the start and completion of projects and what I did to accomplish them.

Once a project is finished, I write a sentence or two about its success or failure, suggestions for better implementation, and how it advances my career goals and serves my institution. The result of this extemporaneous capture of ideas is more accuracy and a more complete description than any I might try to recall months later under the pressure of a deadline to complete the annual report.

Everything goes in the tracking document, even short-term projects such as writing letters of recommendation for students and one-time instructional lectures. I also document my failures—grant proposals that did not get funded and articles that didn’t get chosen for publication. I want the document to reflect my entire work product for the year.

Even with the benefit of this ongoing tracking and assessing, it still takes two days to clean up the narrative and get my work summarized and loaded into an appropriate box. I much prefer to actually do things rather than spend time writing about what I did! So yes, I still complain about the time it takes to transfer my work into the form’s appropriate boxes and checklists. But my complaints are only half-hearted because I understand that career planning and goal development isn’t something to do for a week at the end of the evaluation period.

The tracking serves as a reminder to continually assess my work and how it advances my career goals and visions. A look over the Word document every two or three months gives me an opportunity to give myself immediate feedback and adjust if necessary during the current evaluation period.

My peace with the process is also a result of my realization that my participation in the process enables me to suggest improvements to the process itself. Assessment by nature promotes and requires measurement. Measurement encourages the doing of an action so that it can be counted, tallied, and compared with last year’s number, regardless of whether the action has value or not. Because our profession is evolving, what we assess and use to measure our performance must also evolve. Having participated in the process, I can propose that, for example, we no longer count resources delivered or tally the number of library visits using only the physical gate count and focus instead on more appropriate measures based on data and outcomes.

We are approaching the end of the first quarter of 2014. That means that one quarter of the work that will be part of your annual assessment has already commenced or been completed. Can you recall it accurately? Perhaps more importantly, do you know if it advanced your career vision and goals? And if yes, how?

Most human resources departments have tools available to help you develop a career vision statement and goals. There are also a number of great online resources. One example is the University of California, Berkeley’s human resources department (hrweb.berkeley.edu/learning/career-development/goal-setting). Go into the process expecting to spend some time thinking, revising, and maybe even having a few false starts. The time spent on the process is time well invested in your career.

It is also time well invested in the advancement of our profession. If we as a profession better understand our mission, values, and goals, we will better serve our patrons and advance our institutions.