

Performance Management Training for Library Directors and Supervisors



March 18, 2026

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Summary, Action Steps, and Checklist generated with Microsoft Copilot from the webinar transcript.

Webinar Recording

- Recorded on March 18, 2026
- [Watch the Video](#)
- [ASPeN Event](#)

About Our Speaker

Cindy Carpenter has over 25 years of business and training experience, primarily focused on human resource and people topics. And to complement her training background, she has been a practicing human resource professional in the banking, insurance, and manufacturing industries, as well as owning her own business, Carpenter Business Resources, LLC.

Cindy is an adjunct faculty member at Flathead Valley Community College through the Continuing Education Center, and she is a current member and past board member of the Flathead Valley Chapter of the Society for Human Resource Management.

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Summary of Key Points from the Performance-Management Webinar

1. Performance management is an ongoing process, not an annual task

- True performance management happens daily and continuously—through coaching, feedback, and conversations—not just at annual review time.
- The goal is to help employees perform at their best and align their work with the library's mission, goals, and culture.
- Annual performance appraisals look *backward*; performance management looks *forward*, focusing on growth and development.

2. Clarify goals and expectations

- Supervisors must understand their own goals for performance management: retention, development, accuracy, productivity, or all of the above.
- Clear job descriptions are foundational. They must reflect actual duties, expectations, and required behaviors.
- Update job descriptions regularly so you can measure employees fairly and objectively.

3. Feedback is essential—and must be timely

- Employees want and need regular feedback, even when they say they don't.
- Timely conversations prevent small issues from becoming big ones.
- Positive reinforcement (sincere and specific) boosts engagement; corrective feedback should be solution-based, respectful, and done while the issue is fresh.

4. Consistency is a major driver of culture

- Consistent enforcement of expectations (like attendance or work quality) builds trust.
- Inconsistent treatment leads to resentment and culture breakdown.
- Employees watch how supervisors handle similar situations with different staff.

5. High-performing workplaces share these traits

- Support from leadership
- Positive workplace culture
- Feedback from all directions (supervisors, peers, users)
- Sufficient tools and resources
- Consistent management practices

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6. Understand the context affecting employee performance

Across libraries and workplaces, performance is shaped by:

- Financial pressures and wages
 - Organizational life cycle (growth, plateau, restructuring)
 - Training availability
 - Remote/hybrid work considerations
 - Worker availability and retention challenges
 - Social and political shifts
- Supervisors need to adapt expectations within these realities.

7. Use SMART goals to evaluate expectations

Expectations should be:

Specific, Measurable, Achievable, Relevant, Time-bound.

If the performance process feels off, SMART criteria often reveal the gap.

8. Avoid common evaluation pitfalls

- Similar-to-me bias
- Halo/horn effect
- First-impression bias
- Rating everyone average
- Only remembering the last few weeks of performance
- Proximity bias (favoring those physically near or seen more often)

9. Methods for evaluating performance

- Narrative feedback helps employees understand expectations better.
- Numerical scales can be misinterpreted unless clearly defined.
- 360 reviews can be useful but must be used carefully.
- Behavioral-anchored rating scales (clear descriptions of what “1–5” mean) improve fairness.

10. Document ongoing observations

- Supervisors should maintain notes about both positive and corrective episodes throughout the year.
- Documentation supports fair evaluations and is crucial for potential disciplinary or legal issues.

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11. When discipline is needed: focus on correction, not punishment

- Address issues early and privately.
- Keep discussions factual and free from assumptions.
- Follow the organization's formal disciplinary process (conversations → oral warnings → written warnings → potential discharge).
- Always consult HR on serious matters.

12. Use Performance Improvement Plans (PIPs) appropriately

- PIPs address *skills* or *learning gaps*, not attendance or attitude alone.
- They should be time-limited (usually 30–90 days).
- Supervisors must follow through with scheduled check-ins.
- If improvement doesn't happen within the PIP window, the employee may be a poor fit for the role.

13. Supervisors have key responsibilities

They must:

- Understand policies, procedures, and the employee handbook
- Know the organization's goals and history
- Lead by example
- Communicate clearly and consistently
- Invest time in supervision (often 30–40% of the job)

14. "Rules of the road" for supervisors

- No surprises in evaluations (except positive ones!)
- Behavior left unaddressed is behavior condoned
- Don't rely on assumptions—communicate explicitly
- Perception often becomes reality

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Action Steps & Recommendations for Montana Public Libraries

1. Strengthen ongoing performance conversations (not just annual reviews)

Many Montana libraries have small teams where informal communication is common. Use this to your advantage:

- Build in regular “micro-check-ins” (5–10 minutes) weekly or bi-weekly.
- Use these to provide praise, redirect behavior immediately, or clarify expectations.
- Reduce surprises at evaluation time by making feedback continuous.

Why this matters in MT: Small staffs mean problems or tensions have a big culture ripple. Early, calm intervention keeps them from growing.

2. Review and modernize job descriptions

The webinar stressed that outdated job descriptions weaken evaluations. For Montana libraries:

- Update job descriptions annually—especially if duties shifted due to technology, programming growth, or staffing shortages.
- Ensure duties reflect reality: rural libraries often require cross-training, circulation + tech help + programming + facilities tasks.
- Have staff review and acknowledge their job descriptions to ensure shared understanding.

Why this matters in MT: Many libraries rely on “legacy” job descriptions written when services looked very different.

3. Reinforce fairness & consistency, especially in small-town environments

Supervisors must be consistent in how expectations are applied.

- Address tardiness, conduct, and procedural lapses the same way for everyone.
- Document small conversations, even handwritten notes.
- Be mindful of “similar-to-me” or “we’re friends outside work” bias.

Why this matters in MT: In tight-knit communities, personal relationships blur professional boundaries unless supervisors are deliberate.

4. Use simple tools to build culture without added cost

Montana libraries often have limited budgets. Instead of costly training tools, consider:

- Monthly 15-minute “team huddles” to reinforce values, expectations, and celebrate wins.
- Peer-sharing sessions where staff show others a skill (e.g., Sierra tips, Canva for fliers). Informal cross-shadowing days across roles.

Why this matters in MT: Many rural libraries are understaffed; peer learning fills gaps inexpensively.

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5. Create Individual Development Plans (IDPs)—but keep them small & realistic

IDPs help with retention and growth.

- Use IDPs for staff who show potential or interest in leadership, technology, or programming.
- Keep them achievable: 2–3 goals tied to library priorities.
- Use free or low-cost training (MSL Learn, WebJunction).

Why this matters in MT: Career paths in small libraries are limited; IDPs give employees a sense of direction and recognition.

6. Add structure to evaluations with “behavior-based” examples

To reduce subjectivity:

- Include clear examples of what a “5,” “3,” or “1” means for your library.
- Define expectations for:
 - customer service tone
 - communication with coworkers
 - program prep and follow-through
 - tech support interactions
- Use objective, concrete examples when giving feedback.

Why this matters in MT: Clear standards reduce misinterpretation in small staffs where people may interpret tone or intent differently.

7. Address issues immediately—do not delay hard conversations

- Supervisors often avoid conflict, especially with long-serving or well-liked staff. If you observe a problematic customer interaction, address it the same day.
- Redirect privately, respectfully, and with a solution.
- Document in your supervisor notes.

Why this matters in MT: Avoiding conflict in close communities can allow issues to fester until they become cultural problems or board-level concerns.

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8. Use Performance Improvement Plans (PIPs) only for skill-based problems

The webinar clarified that PIPs should address skill or production issues, not things like attendance or attitude.

Use a PIP if:

- An employee is struggling with technical tasks
- A new system rollout reveals gaps
- Accuracy or process follow-through is slipping

Avoid PIPs for:

- Chronic lateness
- Rudeness
- Insubordination

These require direct disciplinary steps, not skills coaching.

Why this matters in MT: Small staffs make morale sensitive; using the wrong tool can damage trust.

9. Recognize external factors affecting library workers

Montana workers face:

- Holding multiple jobs
- Long commutes
- Limited childcare
- Housing shortages in some regions

Supervisors should:

- Show empathy without lowering core standards
- Maintain clear boundaries: “When you’re here, we need you fully present.”
- Offer flexibility where policy allows, but remain consistent.

Why this matters in MT: These stressors can impact attendance, focus, or performance.

10. Prioritize leadership development for new supervisors

Many Montana library supervisors “grow into” their roles without formal training.

Encourage:

- MSL training sessions (live and recorded)
- SHRM or WebJunction leadership courses
- Mentoring between larger and smaller libraries
- Shadowing opportunities during federation meetings

Why this matters in MT: Many directors and supervisors learned “on the job”; structured support increases confidence and consistency.

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11. Reinforce the library's culture & mission

Supervisors should regularly connect employee goals to:

- Community access
- Lifelong learning
- Digital access
- Excellence in service

This helps employees understand *why* their performance matters.

Why this matters in MT: Purpose strengthens engagement, especially in public service fields.

12. Keep communication open between directors, staff, and boards

Because MT libraries have varied board governance structures:

- Directors should document performance processes clearly for their boards.
- Clarify which decisions are administrative vs. board-level.
- Use standardized processes to reduce the perception of bias.

Why this matters in MT: Boards change frequently and may not understand supervisory best practices.

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New Supervisor Checklist – Montana Public Libraries

1. Know Your Foundations

- Read and understand the **employee handbook** (policies, conduct, discipline, grievance procedures).
- Review your library's **mission, values, and strategic goals**.
- Understand the **organizational structure** (director, board roles, reporting lines).
- Review each employee's **job description** to ensure it reflects current duties.

2. Set Clear Expectations

- Meet with each staff member to clarify:
 - Primary responsibilities
 - Performance standards
 - Behavioral expectations (communication, teamwork, customer service)
- Make sure staff understand what success looks like in their role.
- Update job descriptions if duties have changed.

3. Establish a Routine for Communication

- Schedule **regular check-ins** (weekly or bi-weekly).
- Hold **brief team huddles** (5–10 minutes) to share priorities and reinforce culture.
- Keep an open door—but require respectful, solution-oriented conversations.

4. Provide Continuous Feedback

- Give immediate feedback on:
 - Customer service interactions
 - Procedural errors or successes
 - Team communication issues
- Praise specifically and often.
- Address concerns promptly—don't let them linger.

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5. Document as You Go

- Keep simple, factual notes on:
 - Coaching conversations
 - Performance successes
 - Redirections or concerns
- Store notes in a supervisor file (not the personnel file unless formal).
- Document *facts only*, not assumptions or opinions.

6. Use Performance Tools Effectively

- For annual or semi-annual evaluations:
 - Use clear examples (positive and corrective).
 - Tie ratings directly to job expectations.
 - Avoid biases (similar-to-me, recency, halo/horn).
- For skill-based issues, use a **Performance Improvement Plan (PIP)** with:
 - Specific goals
 - Clear benchmarks
 - Weekly or bi-weekly follow-up
 - A 30–90 day timeline

7. Apply Policies Consistently

- Follow the same standards for attendance, conduct, and procedures for all staff.
- Correct behavior privately but promptly.
- Avoid making exceptions that undermine fairness or morale.

8. Address Difficult Situations Confidently

- Identify whether the issue is:
 - A skill gap (use a PIP)
 - A conduct or rule violation (use progressive discipline)
- Seek guidance from HR, your director, or state resources when needed.
- Never ignore safety issues, harassment, or policy violations.

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9. Support Professional Growth

- Discuss each employee's development goals.
- Encourage training through:
 - MSL Learn
 - WebJunction
 - ARSL, MLA, or federation workshops
- Provide opportunities to practice new skills (e.g., running a program, leading a project).

10. Model the Culture You Want to Build

- Communicate openly and respectfully.
- Stay calm during conflict.
- Show appreciation for staff efforts.
- Maintain integrity and professionalism—especially in small communities.

11. Prepare for Your First Evaluation Cycle

- Gather documentation throughout the year.
- Use clear, specific examples in evaluations.
- Ensure there are **no surprises**—feedback should have been given earlier.
- Discuss future goals and needed support during the review.

12. Know When to Ask for Help

- Complex discipline, legal issues, board conflict, or escalating performance problems may require:
 - Director support
 - HR guidance
 - Consultation with the Montana State Library
 - Consultation with city/county HR (if applicable)