# MU Libraries Annual Performance Review

**Suggested Process**

1. Employee completes annual report form and submits it to direct supervisor for review by mid-January.
2. Supervisor reviews annual report and completes performance review form by the end of February.
3. The performance review meeting between the supervisor and employee should be scheduled between January 1 and March 15. The performance review form should be given to the employee at least 24 hours before the performance review meeting.
4. The annual report and performance review may be updated after the meeting. If they are revised, the supervisor and employee should meet again to discuss and finalize the changes.
5. The performance review form is finalized by comments and signatures in the following order:
	1. Employee
	2. Supervisor
	3. Department/Division Head
	4. Director of Libraries
6. Final version the annual report and performance review form is filed in employee’s personnel file in the MU Libraries Human Resources Office as the record copy.
7. A check-in meeting to review goals and/or performance is also recommended at the 6-month mark, or as requested by employee or supervisor. Goals can be reviewed and modified as necessary at any point in the appraisal year as long as both employee and supervisor are in agreement with the changes.

**For new employees and persons in a new position:**

If an employee begins work in a new position between January and March, goals should be established within two months of the start date, and a short review should be completed on the regular performance review cycle.

**MU Libraries**

**LIBRARIAN & ARCHIVIST ANNUAL REPORT**

|  |  |  |
| --- | --- | --- |
| Calendar Year: |  |  |
|  |
| Name |  | Title |  |
|  | Department |  |

(To be completed by employee)

|  |
| --- |
| **MU Libraries Values** |
| **People** | We value our users, regardless of their level of expertise or affiliation, as the foundation of our mission. We esteem our fellow employees, regardless of their job assignment, as our most valuable asset. We treat all people with respect and courtesy. We celebrate the diversity our staff as one of our greatest strengths. |
| **Service** | Our principal goal is to provide the best quality service possible, at all times, to all our users. We recognize and celebrate excellence whenever and wherever we encounter it. We work together as a team for the greater good d the Libraries and University. |
| **Stewardship** | We maintain our collection and facilities for future generations of scholars. We make the most efficient use of scarce resources. We plan for the challenges which will confront us in the future. |
| **Access** | Freedom of access to information in all forms and for all personal is our most cherished principle. We treasure library ideals of free speech, open inquiry, accessibility, and equality; all of which are upheld by our collections, our services, our policies, and our procedures. |

|  |
| --- |
| **MU Libraries Strategic Goals** |
| **Goal #1** | Integrate the Libraries more fully into the teaching, research, service and economic development missions of the University. |
| **Goal #2** | Develop and implement strategies to improve library collections and services. |
| **Goal #3** | Develop and implement strategies to improve library staffing, space/facilities, funding, and other resources. |
| **Goal #4** | Promote the MU Libraries by enhancing the content, quality and frequency of external communication about our mission and impact. |

|  |
| --- |
| **Departmental Objectives** |
|  |  |
|  |  |
|  |  |
|  |  |

1. Review your position description. If the position description needs to be updated, make the necessary changes and give a brief explanation of them
2. Review and summarize your activities over the past year, focusing specifically on your regular duties and responsibilities as described in your position description. Highlight your top activities or accomplishments and note their importance. You may include activities that span across reporting years or are works-in-progress. Also include activities related to special assignments not in your position description that were assigned during the year.
3. Review and summarize your professional activities for the past year that may include service activities, publications, teaching and innovation. Highlight your top activities or accomplishments and note their importance. You may include activities that span across reporting years or are works-in-progress.
4. What are your goals for the upcoming year? Note how they relate to the MU Libraries Values, contribute to the MU Libraries Strategic Goals, or fit with Departmental Objectives. Goals may relate to your regular job duties or they may be related to your professional development or other activities. Goals can include multi-year or multi-department projects/goals.
5. To accomplish these goals, indicate any training, development, resources, or additional support from your supervisor/or the organization that you will need.

**Annual Report Instructions**

The annual report should be completed by the employee. It is intended to allow the employee to review and summarize his/her activities and accomplishments for the past year and to set goals for the upcoming year. The annual report should be used by the supervisor in conjunction with other information about the employee’s performance when the performance review form is completed.

The annual report form is comprised of two sections. The first section contains the MU Libraries Values, Strategic Goals, and Departmental Objectives. The second section contains 5 questions that should be answered by the employee. The questions can be answered on the form or on attached papers.

**Section 1: MU Libraries Values, Strategic Goals, and Departmental Objectives.**

1. The MU Libraries Values and Strategic Goals will be updated by the HR Manager.
2. When the values and goals change, they will be changed for the upcoming year and any evaluation or review will be done with regards to the goals that were effect at the start of the review year. For example, if the values and goals are updated in January, they will be effective for the next review cycle, rather than mid-year.
3. Departmental Objectives may change on an annual basis. These should be communicated to the employee by the department or division head. The objectives for the following year should be given to the employees at the start of the new review cycle. They should also be copied to the HR Manager.

**Section 2: Questions**

1. *Review your position description. Revise it and comment on any changes that you think are needed.*
	1. The HR Manager will email you a link to your current position description. It is always available to you on the MU Libraries website.
	2. If the position description is current, note that you have reviewed it and that no changes are needed.
	3. If the position description needs to be updated, make the necessary changes and give a brief explanation of them.
2. *Review and summarize your activities over the past year, focusing specifically on your regular duties and responsibilities as described in your position description. Highlight your top activities or accomplishments and note their importance. You may include activities that span across reporting years or are works-in-progress.*
	1. The summary of your activities can be in list or narrative form.
	2. The activities that you choose to highlight could be those that you think were personally important, or important to the organization. These activities are not necessarily those that took the most time, although they might be.
3. *Review and summarize your professional activities for the past year that may include service activities, publications, teaching and innovation. Highlight your top activities or accomplishments and note their importance. You may include activities that span across reporting years or are works-in-progress.*
	1. The summary of your activities can be in list or narrative form.
	2. The activities that you choose to highlight could be those that you think were personally important, or important to the organization. These activities are not necessarily those that took the most time, although they might be.
4. *What are your goals for the upcoming year? Note how they relate to the MU Libraries Values, contribute to the MU Libraries Strategic Goals, or fit with Departmental Objectives. Goals can relate to your regular job duties or they can be related to your professional development or other activities. Goals can include multi-year or multi-department projects/goals.*
	1. Every goal will not relate to every value, goal, or objective. A goal may only relate to one value, goal or objective.
	2. You do not have to have goals that relate to all of the values, goals, or objectives. Often the scope of your work will only be directly related to one or two values, goals, or objectives.
	3. Goals can be related to your regular duties or they can be related to professional development, service activities, publications, or teaching and innovation.
	4. Goals should be attainable. It may take more than one year to achieve them.
5. *Indicate any training, development, resources, or additional support from your supervisor/the organization that you will need to accomplish these goals.*
	1. This may include financial resources for training or technology, or it may include assistance and support from another department in the libraries or on campus.

**MU Libraries**

**LIBRARIAN & ARCHIVIST PERFORMANCE REVIEW**

|  |  |  |
| --- | --- | --- |
| Calendar Year: |  |  |
|  |
| Name |  | Title |  |
|  | Department |  |

(To be completed by supervisor)

|  |
| --- |
| **MU Libraries Values** |
| **People** | We value our users, regardless of their level of expertise or affiliation, as the foundation of our mission. We esteem our fellow employees, regardless of their job assignment, as our most valuable asset. We treat all people with respect and courtesy. We celebrate the diversity our staff as one of our greatest strengths. |
| **Service** | Our principal goal is to provide the best quality service possible, at all times, to all our users. We recognize and celebrate excellence whenever and wherever we encounter it. We work together as a team for the greater good d the Libraries and University. |
| **Stewardship** | We maintain our collection and facilities for future generations of scholars. We make the most efficient use of scarce resources. We plan for the challenges which will confront us in the future. |
| **Access** | Freedom of access to information in all forms and for all personal is our most cherished principle. We treasure library ideals of free speech, open inquiry, accessibility, and equality; all of which are upheld by our collections, our services, our policies, and our procedures. |

|  |
| --- |
| **MU Libraries Strategic Goals** |
| **Goal #1** | Integrate the Libraries more fully into the teaching, research, service and economic development missions of the University. |
| **Goal #2** | Develop and implement strategies to improve library collections and services. |
| **Goal #3** | Develop and implement strategies to improve library staffing, space/facilities, funding, and other resources. |
| **Goal #4** | Promote the MU Libraries by enhancing the content, quality and frequency of external communication about our mission and impact. |

|  |
| --- |
| **Departmental Objectives** |
|  |  |
|  |  |
|  |  |
|  |  |

1. Review the employee’s position description and any suggested revisions.
2. Review the employee’s activities over the past year, focusing specifically on the regular job duties and responsibilities as described in the position description. Consider the employee’s goals for the year. Consider the activities’ alignment with the MU Libraries Values, Strategic Goals, and Departmental Objectives. Comment on the employee’s work performance.
3. Review the employee’s activities over the past year in areas that include professional activities, service activities, publications, teaching and innovation. Consider the employee’s goals for the year. Consider the activities’ alignment with the MU Libraries Values, Strategic Goals, and Departmental Objectives. Comment on the employee’s performance in these areas.
4. Please comment on employee’s performance in the following skill areas, considering rank and experience:

|  |  |
| --- | --- |
| * Professional Skills and Knowledge
 | * Analytical and Critical Thinking Skills
 |
| * Communication and Interpersonal Abilities
 | * Supervisory, Management, or Leadership Skills
 |
| * Technological Skills and Knowledge
 | * Commitment to Quality Service
 |

1. If any concerns in questions 1-4 indicate areas that need improvement, an action plan for improvement must be included below.
2. Supervisor’s Expectations for the Upcoming Year:

**Please print and sign after all sections of the form are completed.**

Employee: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

The employee’s signature above indicates that the performance review has been received and discussed with the supervisor. It does not imply agreement with the comments or ratings given.

Supervisor: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Division Head: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Director: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

The director’s signature will be obtained after the completed review is submitted to the MU Libraries HR Office.

**Performance Review Instructions**

The performance review should be completed by the supervisor. It is intended to allow the supervisor to review the employee’s performance over the past year, to note whether the employee is meeting expectations, and to set the expectations for the upcoming year. The performance review form should be based on review of the individual’s Annual Report and given to the employee at least 24 hours before the performance review meeting. It should be revised as needed based on the discussion in that meeting. Once finalized, this form, along with the annual report, is sent to the MU Libraries HR Office.

The performance review is comprised of two sections. The first section contains the MU Libraries Values, Strategic Goals, and Departmental Objectives. The second contains six questions that should be answered by the supervisor. The questions can be answered on the form or on attached paper.

**Section 1: MU Libraries Values, Strategic Goals, and Departmental Objectives.**

1. The MU Libraries Values and Strategic Goals will be updated by the HR Manager.
2. When the values and goals change, they will be changed for the upcoming year and any evaluation or review will be done with regards to the goals that were effect at the start of the review year. For example, if the values and goals are updated in January, they will be effective for the next review cycle, rather than mid-year.
3. Departmental Objectives may change on an annual basis. These should be communicated to the employee by the department or division head. The objectives for the following year should be given to the employees at the start of the new review cycle. They should also be copied to the HR Manager.

**Section 2: Questions**

1. Review the employee’s position description and any suggested revisions.
	1. The employee has already reviewed the position description and suggested revisions if necessary. Respond to the suggested changes. Consider the employee’s job, and if the revisions should be implemented.
	2. If the position description needs to be updated, be sure to send the updated position description to the HR Manager to be put online.
2. Review the employee’s activities over the past year, focusing specifically on the regular job duties and responsibilities as described in the position description. Consider the employee’s goals for the year. Consider the activities’ alignment with the MU Libraries Values, Strategic Goals, and Departmental Objectives. Comment on the employee’s work performance with particular attention to areas with meritorious work performance.
3. Review the employee’s activities over the past year in areas that include professional activities, service activities, publications, teaching and innovation. Consider the employee’s goals for the year. Consider the activities’ alignment with the MU Libraries Values, Strategic Goals, and Departmental Objectives. Comment on the employee’s performance in these areas.
4. Overall Evaluation of Employee Performance. Consider rank and experience when completing the evaluation.
	1. You are asked to evaluate the employee based on 6 competencies. Construct your review on the employee based on these six competencies, noting any areas that may need improvement.
	2. Be sure to consider the employee’s performance throughout the year. Do not consider only one or two events that occurred during the year.
5. If the evaluation above indicates areas that need improvement, an action plan for improvement must be included below.
	1. As the supervisor, you need to coach the employee on how they can meet expectations in any of the competency areas that might need improvement. This question is for you to document specific actions that the employee can take to help improve their performance.
6. Supervisor’s Expectations for the Upcoming Year:
	1. When setting your expectations for the upcoming year, consider the employee’s goals, the departmental objectives, and the MU Libraries values and strategic goals.
	2. This question is to help you and the employee set expectations for both the regular job duties as described in the job description and for other activities, including professional development, service activities, publications, or teaching and innovation.