# MU Libraries Annual Performance Review for Librarians & Archivists

**Suggested Process**

1. Employee submits information to direct supervisor by mid-January.
2. Supervisor reviews information and completes performance review 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 performance review form may be updated after the meeting. If it is revised, the supervisor and employee should meet again to discuss and finalize any 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 of the performance review 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.

**Information and Guidance on Preparing the Annual Performance Review Form**

The Annual Performance Review form 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. It is also 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.

Supervisor comments and evaluations should be given to the employee at least 24 hours before the performance review meeting. The form should be revised as needed based on the discussion in that meeting. Once finalized, the Annual Performance Review form is sent to the MU Libraries HR Office.

**MU Libraries Values, Strategic Goals, Departmental Objectives, and Individual Goals**

* The listed MU Libraries Values, Strategic Goals, Department Objectives, and Individual Goals are those that are in place for the evaluation period.
* When the values and goals change, they will be changed for the upcoming year. Any evaluation or review will be done with regards to the goals that were in effect at the start of the review year. For example, if MU Libraries Values and Strategic Goals are updated mid-evaluation period, they will be effective for the next review period.
* The MU Libraries Values and Strategic Goals will be updated by the HR Manager.
* 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.
* Individual Goals listed for the evaluation period should conform to the agreed-upon goals from the previous year’s Annual Report (or other revisions during the evaluation period).

**Annual Performance Review Questions**

Questions 1 – 5 are to be completed by the employee and commented upon by the supervisor. Questions 6 – 7 are to be completed by the supervisor after review of Questions 1 – 5 and in conjunction with other information about the employee’s performance.

1. *Review your position description. Revise it and comment on any changes that you think are needed.*
   * The HR Manager will email you a link to your current position description. It is always available to you on the MU Libraries website.
   * If the position description is current, note that you have reviewed it and that no changes are needed.
   * If the position description needs to be updated, make the necessary changes and give a brief explanation of them.
   * *For Supervisors:* Respond to any suggested changes. Consider the employee’s job and if the revisions should be implemented. 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 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.*
   * The summary of your activities can be in list or narrative form.
   * 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.
   * Consider how (or if) your individual goals for the evaluation period were met or were changed.
   * *For Supervisors:* 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 and summarize your professional-development activities for the past year, including service activities, publications, teaching and innovation. Highlight your top professional-development activities or accomplishments and note their importance. You may include activities that span across reporting years or are works-in-progress.*
   * The summary of your professional-development activities can be in list or narrative form.
   * 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.
   * *For Supervisors*: Review the employee’s activities over the past year in areas that include professional-development 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. *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.*
   * Every goal will not relate to every value, goal, or objective. A goal may only relate to one value, goal or objective.
   * 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.
   * Goals can be related to your regular duties or they can be related to professional development, service activities, publications, or teaching and innovation.
   * Goals should be attainable. It may take more than one year to achieve them.
   * *For Supervisors:* When setting your expectations for the upcoming year, consider the employee’s goals, the departmental objectives, and the MU Libraries values and strategic goals. 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 professional-development or other activities, including professional development, service activities, publications, or teaching and innovation.
5. *To accomplish these goals, indicate any training, development, resources, or additional support from your supervisor/the organization that you will need.*
   * 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.
6. *To be completed by Supervisor: Overall evaluation of employee performance. Comment on employee’s performance in the following skill areas, considering rank and experience:*

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| --- | --- |
| * *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* |

* + 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.
  + Be sure to consider the employee’s performance throughout the year. Do not consider only one or two events that occurred during the year.

1. *To be completed by Supervisor: If there are any areas of concern, an action plan for improvement must be included below.* 
   * As the supervisor, you need to coach the employee on how s/he 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 his/her performance.