

▶ ANNUAL REVIEW FORM

PLEASE TYPE OR PRINT LEGIBLY.

Employee Name: _____ **Supervisor Name:** _____

PERNR: _____ **Department/Unit:** _____

Classification/Job Title: _____ **Date Due:** _____

Conduct a **Performance Review meeting** and discuss the following:

- Job related tasks and duties
- Particular accomplishments that were achieved
- Alignment of behaviors with unit/college core values and MSU core values
- Employee feedback for supervisor
- Progress on identified goals, if set
- Progress on employee development plan, if completed

OVERALL PERFORMANCE LEVEL:

When choosing a level, consider the criteria detailed on pages 3 & 4. Performance should be considered over the entire year.

- Does not meet expectations*
- Developing
- Meets expectations
- Exceeds expectations

*Requires a Performance Improvement Plan. Contact MSU Employee Relations PRIOR to meeting with employee.

RATIONALE FOR PERFORMANCE LEVEL (Job performance and behavior, accomplishments, etc.)

Supervisor's comments: (Attach additional documentation if necessary.)



When the **Performance Review discussion** is completed, provide a copy of signed documents to the employee and retain a copy of the documents in the department. Supervisor or unit designee: Scan and email signed **Annual Review form** from an MSU email address to: performance@hr.msu.edu. MSU is an affirmative-action, equal-opportunity employer.

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Progress on identified goals and development plan: (Attach additional documentation if necessary.)

Employee's comments (optional):

Signatures below indicate that the Performance Review discussion was completed.

Employee Signature: _____ Date _____

Supervisor Signature: _____ Date _____



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Performance Level Criteria

MEETS EXPECTATIONS — Staff member consistently meets expectations on most, if not all, duties and goals; also demonstrates MSU core values of quality, inclusiveness and connectivity. Demonstrates college/unit core values, where applicable. For example:

- The work product or end result meets job performance expectations with efficiency and effectiveness.
- Demonstrates depth and breadth of role knowledge.
- Dependable and consistently meets commitments.
- Develops and maintains effective work relationships with peers, administrators, stakeholders and customers.
- Contributes to an environment where differences are valued and encouraged.
- Adds value by offering solutions and/or suggesting improvements.

Additional considerations when evaluating supervisors:

- Completes Performance Excellence Process for staff on time.
- Supports development opportunities for staff.
- Holds self and staff accountable.

DOES NOT MEET EXPECTATIONS — Staff member does not meet expectations on many, if not all, duties and goals, and/or does not consistently demonstrate MSU core values of quality, inclusiveness and connectivity. Does not demonstrate unit/college core values. For example:

- The work product or end result does not meet job performance expectations.
- Inconsistently demonstrates role knowledge.
- Inconsistent in dependability and meeting commitments.
- Does not maintain effective work relationships with peers, administrators, stakeholders and/or customers, which may result in reduced ability for employee or department to be successful.
- Does not contribute to an environment where differences are valued and encouraged.
- Rarely offers solutions and/or suggests improvements.

Additional considerations when evaluating supervisors:

- Rarely supports staff in ongoing development.
- Rarely holds self and/or staff accountable.
- Often does not complete the Performance Excellence process in a timely and/or effective manner.



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Performance Level Criteria (continued)

EXCEEDS EXPECTATIONS — Staff member consistently exceeds expectations on most, if not all, duties and goals, while consistently making exceptional contributions towards MSU core values of quality, inclusiveness and connectivity.

Exceptional demonstration of unit/college core values where applicable. For example:

- The work product or end result consistently exceeds job performance expectations while increasing efficiency and effectiveness.
- Takes initiative to expand depth and breadth of knowledge, regarding their role and the university as a whole, in order to drive innovation and continuous advancement.
- Enhances existing work relationships with peers, administrators, stakeholders and customers and seeks opportunities for new collaborations.
- Serves as a role model by fostering an environment where differences are valued and encouraged.
- Adds significant value by offering solutions and/or suggesting improvements that address the root cause of problems.

Additional considerations when evaluating supervisors:

- Creates a high performance work environment demonstrated by a productive, agile, collaborative team.
- Implements significant change effectively.
- Is highly innovative and strategic in meeting changing needs and priorities.

DEVELOPING — Staff member partially meets expectations, duties and goals, but select improvements are necessary. Generally demonstrates MSU core values of quality, inclusiveness, and connectivity and unit/college core values, where applicable. For example:

- New to role/responsibilities and is still learning key job components.
- Requires more than the expected level of supervision to complete role successfully.
- Often can be counted on to be dependable and meet commitments, but may need reminders.
- Develops and maintains effective work relationships with most peers, administrators, stakeholders and customers.
- Generally contributes to an environment where differences are valued and encouraged.
- Occasionally adds value by offering solutions or suggesting improvements.

Additional considerations when evaluating supervisors:

- Occasionally supports staff in ongoing development.
- Inconsistently holds self and/or staff accountable.
- Inconsistently conducts the Performance Excellence process in a timely and/or effective manner with staff.



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