

# UNIVERSITY OF MISSOURI

## PERFORMANCE REVIEW FORM INSTRUCTIONS

This form is a tool to assist the supervisor and employee in discussions about job duties, performance standards, and job performance. The process involves continuous opportunity to review performance and to communicate expectations to the employee as soon as performance standards are observed. Based upon data which has previously been established (Sections 1, 2, and 3) and reviewed with the employee, the supervisor evaluates employee performance of each job duty (Section 4) according to established guidelines.

**SECTION 1 - Job Duties** A list of job duties should be developed at the beginning of each review period (completion of: probationary or qualifying period (beginning of annual cycle.) The supervisor should list only those duties which will pertain to a formal performance review. The duties should be reviewed with the employee to reach understanding on all points.

**SECTION 2- Performance Expectations and Standards** With the assistance of the employee, the supervisor should list the performance standards believed to be most appropriate for each selected duty. The standards should be reviewed by the supervisor and modified as may be required to reflect his/her actual expectations. As expectations change, the standards should be discussed with the employee.

**SECTION 3- Periodic Feedback** As performance is observed during the course of this review period, the supervisor should note the extent to which performance standards are met. Comments regarding performance should be communicated to the employee at the time performance is observed. When standards are not met, the specific problem should be discussed between the supervisor and the employee. They should agree on the specific actions to be taken by each in order to meet expected standards. A statement of the problem and the actions to be taken by each should be noted as well as any comments regarding the employee's progress toward improved performance. Notes should also be recorded regarding employee strengths, accomplishments, and performance which exceeded established expectations.

**SECTION 4- Evaluation** This section should be completed by the supervisor after the formal performance review with the employee according to the following guidelines:

**Exceeds standards** - This rating indicates that performance on the job is consistently above average and frequently exceeds the standards required of an employee.

**Meets standards** - This rating indicates that performance on the job is thoroughly satisfactory and consistently meets the standards required of an employee.

**Below standards** - This rating indicates a level of performance that is consistently deficient. Definite improvement is needed for continued employment.

**Overall** - This is a total rating, considering all factors, that best describes the employee's performance for the entire review period.

**Reviewer's Comments:** Make any additional comments which will summarize, clarify, or supplement the information contained in the above sections. Points of disagreement may be cited here. Any additional information should be shared with the employee.

**Employee's Comments:** Make any additional comments which will summarize, clarify, or supplement the information contained in the preceding actions. Points of disagreement may be cited here. The employee's signature indicates that he/she has discussed this appraisal with the supervisor. It does not necessarily imply agreement with the supervisor.

**Note: A copy of the completed performance review form should be presented to the employee and the form then forwarded to the Personnel Office for placement in the Employee's Personnel File.**

### EXAMPLE

1. JOB DUTIES	2. PERFORMANCE EXPECTATIONS AND STANDARDS	3. PERIODIC FEEDBACK		4. EVALUATION		
		CRITICAL INCIDENTS;	SPECIFIC ACTIONS FOR IMPROVEMENTS	Below Standards	Meets Standards	Exceeds Standards
Enters, revises, and retrieves correspondence, etc. stored in personal computer/word processing system.  Orders supplies and equipment from outside vendors and University departments.	Log of system documents is accurate and up-to-date. Uses system features/capabilities proficiently.  Correct item(s) and number of items are ordered. No shortages of critical supplies occur.	9/3 Discussion on properly setting tabs/returns to reduce the time required to review documents.	Secretary will review system operating manual section on formatting.	P		
		11/2 Letter received from a unit manager praising the special effort made to improve the unit's inventory control system.			P	
				<b>OVERALL</b>		
				<b>P</b>		