Procedural Guide to Conducting Performance Reviews at Towson University
Use this resource to guide you through successfully completing an effective performance evaluation form with those you supervise.

March 2018 Beginning of Evaluation Cycle

The following tasks to be accomplished between the Manager/Supervisor and the Employee:

☐ Review job responsibilities/update job description form
☐ Review and discuss employee development plans
☐ Manager/Supervisor provides a Performance Review Evaluation Form to the employee
☐ Mutually set goals and expectations
☐ Keep Performance Evaluation Review on file until the end of the review period

August 2018 Midway through the Evaluation Cycle

Manager/Supervisor is encouraged to collaborate with their Employee:

☐ Review mutually set goals and provide feedback throughout the cycle
☐ Identify accomplishments
☐ Determine gaps in performance
☐ Incorporate employee feedback
☐ Adjust goals if necessary
☐ Determine if a Performance Improvement Plan is necessary

March – April 2019 End of the Performance Evaluation Cycle

Manager/Supervisor tasks to complete:

☐ Discuss goals set
☐ Determine development needs
☐ Mutually set goals for the coming year

Review Period
March 1, 2018- February 28, 2019

Performance Review Completion
March 8 – May 10, 2019

Deadline to submit Performance Review to: PerformanceReviews@towson.edu no later than May 17, 2019
How to Complete Performance Review Forms (Non-Exempt)

For Non-Exempt (Do not complete for non-exempt employees hired on or after October 1, 2018.)

Complete the top table of information for the employee you are reviewing.

(page 1)

Column I

☐ Employee Name
☐ Employee ID – The Employee ID can be found on his/her timesheet.
☐ Job Title
☐ Division
☐ Section
☐ Employee Status: Regular or Contingent II
☐ Supervisor/Reviewer’s Name

Column II

☐ Date of Review
☐ Period Covered
☐ Employment Record#
☐ Department
☐ Unit
☐ Supervisor’s Employee ID

Evaluate the employee on the Performance Factor/Project (Meets Expectations or Does Not Meet Expectations): Customer Service, Cooperation and Teamwork, Communication, Attendance and Punctuality, Quality of Work, Quantity of Work, Job Knowledge, Supplementary Performance Factor/Project, Supplementary Performance Factor/Project.

(pages 2-4)

☐ Provide specific examples completed tasks/goals/projects that supports rating in the Comments on Performance section.

Review the employee’s cumulative performance throughout the review cycle. Check the Overall Performance Rating – Meets Expectations or Does Not Meet Expectations

(page 4)

☐ Count how many “Meets Expectations” ratings the employee was given
☐ Count how many “Does Not Meet Expectations” ratings assigned
☐ If an employee is rated in five or more Performance Factor/Project categories as “Meets Expectations”, then the Final Overall performance Rating would be “Meets Expectations”
☐ Mark X on the corresponding box
If an employee had rated 6 or more Performance Factor/Project categories as “Does Not Meet Expectations” then a Personal Improvement Plan should be initiated.

Hold a feedback session with the employee to discuss his/her performance from the review period.

**Development Plan**
(page 5)

1. Identify the employee’s major strengths during performance review cycle.
2. List areas for improvement/enhancement (if any).

**Action Plan**
(page 5)

3. Record the Employee’s action plan to improve the employee’s performance to help achieve the goals during the next performance period.
   - Identify professional development opportunities may be appropriate for the employee that may lead to professional growth and development
   - Identify action plan, timeframe to complete and determine if the action plan was “Recommended” or “Mandatory”
   - Supervisor to include comments in the Action Plan

**Performance Review Signatures**
(page 6)

- Ensure you have rating on Performance Factors, Overall performance rating, Development plan for upcoming year
- The employee’s signature and date
- Your signature Supervisor’s/ Reviewers Signature and date
- Reviewer’s Supervisor signature and date
- Employee’s Feedback/Comments
How to Complete Performance Review Forms (Exempt)

All Exempt employees must a Performance Evaluation Process Exempt Staff- Major Goals form if length of service is 6 months or longer.

Complete the top table of information for the employee you are reviewing.

(page 1)

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- Job Title
- Division
- Employee Status: Regular or Contingent
- Supervisor/Reviewer’s Name

Column II

- Date of Review
- Period Covered
- Employment Record#
- Department
- Unit
- Supervisor’s Employee ID

Attainment of Goals

(page 1)

Manager collaborates with employee to list specific job-related goals that were set the previous year to evaluate the employee’s performance.

- Please include both quantitative (measureable) as well as qualitative (behaviors, traits) components within the goal.
- Incorporate all interim reviews (i.e. mid-year, etc.) and any pertinent data/information to provide appropriate feedback.
- Review the “Major Goals For This Rating Period”
- Determine if the Results/Attainment of goals with “Meets Expectations” or “Does Not Meet Expectations”.

Narrative Review

(page 2)

- Please include a 1-3 paragraph narrative about the overall employee's performance.
Rate Employee on “Meets Expectations” or “Does Not Meet Expectations”  
(page 3)

Meets Expectations: Consistently proficiency in the execution of the majority of critical job responsibilities and objective throughout the rating period.

Does Not Meet Expectations: Overall performance needs improvement; job responsibilities and objectives have not been consistently met throughout the rating period.

Goal Setting for the next rating period 
(page 3)

Manager collaborates with employee to list specific job-related goals that are set for the upcoming year to evaluate the employee’s performance.

☐ Please include both quantitative (measureable) as well as qualitative (behaviors, traits) components within the goal.
☐ Incorporate all interim reviews (i.e. mid-year, etc.) and any pertinent data/information to provide appropriate feedback.
☐ Review the “Major Goals For This Rating Period”
☐ Determine if the Results/Attainment of goals with “Meets Expectations” or “Does Not Meet Expectations”.

Performance Review Signatures 
(page 4)

☐ Ensure you have rating on Performance Factors, Overall performance rating, Development plan for upcoming year
☐ The employee’s signature and date
☐ Your signature Supervisor’s/ Reviewers Signature and date
☐ Reviewer’s Supervisor Signature and date
☐ Employee’s Feedback/Comments