

PERFORMANCE EVALUATION

CSUEU Chapter 308 Workshop

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What is a performance evaluation?

- A review of an employee's performance **based on job-related criteria.**
- The purpose of evaluations is to **provide guidance for performance development and improvement.**
- It should acknowledge changes in the employee's position (including workload) that occurred since the last evaluation.

EVALUATION FORM & GUIDELINES ARE PUBLISHED ONLINE:

www.csustan.edu/hr/performance-evaluation



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When Am I Evaluated?

- **Temporary Employees** (10.3)
 - Periodic evaluations
 - IF 12 month appointment = Annual Performance Review
- **Probationary Employees** (10.2)
 - 3, 6 and 11 Months - No Combined Evaluations
 - IF reclassified, new probationary period may be required
 - Waiver Options Available
- **Permanent Employees** (10.1)
 - Annual Evaluations - No Combined Evaluations
 - You may be evaluated more: Performance Plan
 - Only Events Relevant to Review Period Allowed (July 1-June 30)
 - Shadow File Allowed Related to Current Evaluation
 - You may ask for copies of this and your official personnel file

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Who Provides the Evaluation?

- The draft evaluation must be given by your non-bargaining unit supervisor, so per the new contract **Academic department chairs/leads cannot** give you your draft evaluation.
- The contract language requiring an evaluation be prepared by someone familiar with your duties language was **removed** from the contract. (10.7)

CSU East Bay has a Self-Evaluation Form.

- **Pro:** You can provide an honest self-evaluation.
- **Con:** You're doing your manager's job.

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My Evaluation is Based on ...

Job Related Criteria / Position Descriptions. (10.5)

An Evaluation:

- May NOT BE A Punitive Tool
- Is not an opportunity for management to arbitrarily add new job duties

**THIS CAN BE
GRIEVED**

The contract specifies that if a position description is altered, you must be notified **a minimum of 7 days** prior to its effective date. Your position description should be an adequate representation of the work you perform. An updated position description **may** warrant an IRP/classification review.

Ask a Steward for Help.

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PERFORMANCE FACTORS RATING

1. QUALITY OF WORK
2. QUANTITY OF WORK
3. WORK HABITS
4. RELATIONSHIPS WITH PEOPLE
5. TAKING ACTION INDEPENDENTLY
6. ATTENDANCE
7. ANALYZING SITUATIONS AND MATERIALS
8. SUPERVISING THE WORK OF OTHERS (if applicable)
9. PERSONNEL MANAGEMENT PRACTICES (if applicable)

The rating categories are:

1 - Performance seriously deficient and requires immediate improvement.

2 - Improvement needed for performance to meet expected standards

3 – Satisfactory-performance meets expectations

4 – Performance frequently exceeds expected standards

5 – Performance consistently exceeds expected standards

Metrics and scales are clearly defined and achievable.



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Performance Concerns

- Any performance concerns (2 or less) should be brought to the employee's attention **as early as possible** to allow time for correction. (Performance plan may be recommended)
- It is **unreasonable** to bring up the concerns only at the time of evaluation. Evaluations should not be the first time you hear of performance concerns.
- If negative comments cannot be substantiated with any kind of proof, **YOU need to request specifics**. If they cannot substantiate negative comments, request it be removed.

THIS CAN BE GRIEVED (10.6)

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How do I Prepare for an Evaluation?

- Review your Job [Position] Description (JD) / Expectations
- Supervisor **should have the ability to articulate** an employee's performance on the scale of 1-5.
- **Seek clarification** of any duties that are unclear
- **Set Goals** - with Supervisor, but have your own too!
- Identify any **Training/Education** necessary for the position
- Track Accomplishments and Growth
 - When You Attain Goals
 - Volume of Work Tracking
 - Revisions to JD since last Evaluation
 - Keep and gather copies of related materials / letters / emails

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Review of Your Evaluation

The employee shall be given up to a **maximum of ten (10) work days** to review the draft evaluation and provide input, if any, to the Appropriate Administrator. (10.8)

You MAY elect to waive this, but remember:

These evaluations can give you justification for a raise / IRP/In-Class Progression / Reclassification / Professional Development.

Do YOU want to forego a salary increase opportunity to appease a manager who was unprepared?

GRIEVABLE if you ask for the 10 days and you don't get it.

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Employee Input & Copy of Your Evaluation

Provide input, as necessary, and get a copy.

How to prepare input? Ensure that the evaluation is an accurate reflection of duties, as well as the breadth and skill level at which you perform your work. (10.9)

Get that copy. It is important to keep copies of your performance evaluations to include as evidence for In-Range Progression, Reclassification proposals. (10.10)



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Challenging & Rebutting Your Evaluation

- **Challenge Your Final Evaluation** (10.11)

YOU are responsible for requesting a meeting with the appropriate administrator. **You CAN** include your union representative if you wish. Questions? Your performance evaluations may be reviewed if you apply to other positions on campus (past practice).

- **Rebuttal** (10.12) Express areas of disagreement regarding **specific areas** of the evaluation: job related criteria & **NOT** an opportunity to express management's failures. No timeline, you can submit as long as you are employed by the University.

- Performance evaluations are **only grievable if** terms of the contract have been **violated, misinterpreted, or misapplied**. (10.13)

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What If I Do NOT Receive an Evaluation?

The lack of a performance evaluation **CANNOT** be the basis for denying a salary increase. (10.4)

Why is THAT Important?

Until steps are restored, performance evaluations and subsequent requests for **In Range Progressions** (IRP) are our ONLY mechanism to request a pay increase based on performance.

If your evaluations are **satisfactory or you do not receive one**, you should be applying for an IRP every 12 months from your last IRP decision or at least every 15 months.

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IMPORTANT!

The evaluation should **NOT** be a carbon copy of the previous year.

The administrator/supervisor must put thought into your evaluation.



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Final Thoughts . . .

- Your performance evaluation affects you, your salary, your development. **You are your best advocate.** These are not the times to be bashful or passive.
- Consider **contacting a steward** or **attending steward training** if you want to learn more about the collective bargaining agreement, its tools, what it offers, your rights and how to enforce them.

The more collective knowledge we have, the stronger our union becomes.



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