

Performance Evaluations: Refresher

Human Resources - Summer 2023



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Agenda

In this course, we will cover the following topics:

- The Narrative
- CSUEU Process & Workflow
- CBA Form Review
- Timeline and Due Dates
- Probationary Employees
- Resources and Support



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The Narrative



The narrative should:

- Explain ratings
- Not be the first time an employee is being corrected on an issue
- Should include facts relevant to the employee's performance of their essential job duties - reference the position description



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CSUEU Process

AA Gathers Info

The Appropriate Administrator gathers info from lead worker, dept chair, evaluator

AA Sends Draft*

The Appropriate Administrator sends the draft evaluation to the employee (Article 10.7

*Can be sent to employee by email or in person

Employee Review

Employee has 10 work days to review draft eval and provide any input before it's finalized

AA Finalizes Eval

The Appropriate Administrator finalizes the evaluation after getting input from the employee

Eval Delivered

Final evaluation provided to the employee after all required signatures (employee is last)

Your dept. or division may require VP signature check with your manager

Note: No changes to the evaluation allowed after the employee signature



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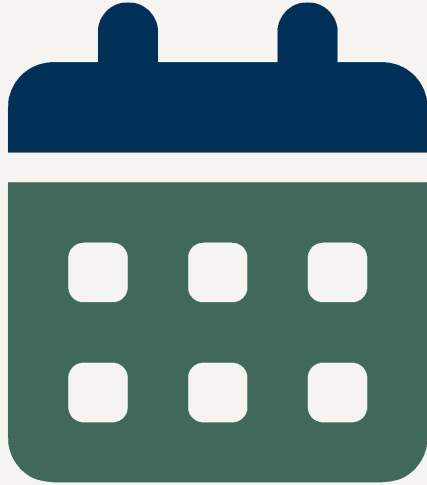
Signatures & Sending to HR



- Adobe Sign:
 - Scanning/sending electronically
- Email:
 - Send to PerfEval@csumb.edu



Timeline and Due Dates



Review Period: 7/1/22 - 6/30/23

Bargaining Unit Staff

Due to HR on or by: 7/31/23

Confidential and MPP

Due to HR on or by: 8/31/23



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Forms

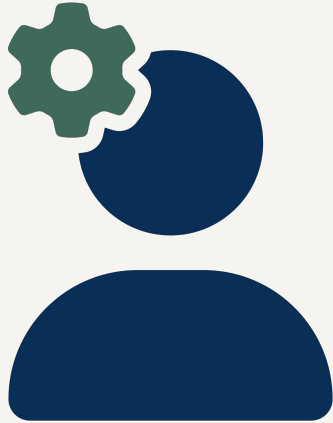


Make sure to use the correct form:

- [APC \(Unit 4\)](#)
- [CSUEU \(2, 5, 7, 9\) and SUPA \(8\)](#)
- [Confidentials and Teamsters \(6\)](#)
- [MPP](#)



Probationary Employees



There are separate requirements for probationary evaluations:

- **CSUEU:** at the end of 3, 6, 11 months
- **APC, Teamsters, SUPA:** once during their first 12 months (typically at 6 months)

Final evaluations are completed no less than 30 days prior to the end of probation.

If you have an issue with a probationary employee, let's talk.



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Remember:



- Attach the Self-Evaluation and Rebuttal Statement (if one was submitted) to the Performance Evaluation.
- Provide the employee with a copy of the fully signed Performance Evaluation and all attachments.
- Submit the Performance Evaluation (with any attachments) to Human Resources on or before the deadline – **July or Aug 31.**



Additional Support Resources



Contact HR (perfeval@csumb.edu) for:

- Previous years' performance evaluations*
- Employee position description*

Webpage:

- https://csumb.edu/hr/performance_evaluation

HR Contact:

perfeval@csumb.edu

*if you don't have a copy



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Questions?



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