Performance Evaluations Refresher



Agenda

We will cover the following topics:

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



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



Process

Appropriate Employee AA Finalize AA Sends Evaluation Administrator (AA) Draft Review Draft Delivered Gathers The Appropriate The Appropriate Employee has 10 Final evaluation The Appropriate Administrator sends Administrator business days or 14 provided to Administrator the draft evaluation gathers calendar days employee after all finalizes the to the employee. information from (depending on required signatures evaluation after lead worker, bargain unit) to (employee last). employee input. Can be sent by department chair review draft and email or in person. and/or evaluator. provide input Your VP may before it's finalized. require review – check first.

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



Signatures & Sending to HR



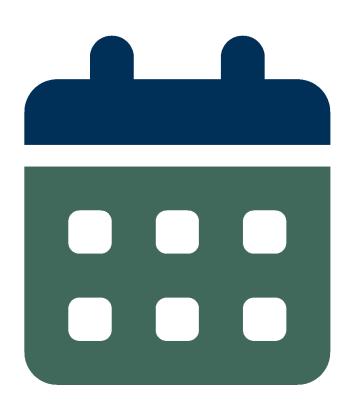
AdobeSign

- Scan & email
- Or Send in AdobeSign workflow

PerfEval@csumb.edu



Timeline & Due Dates



Review Period

• June 30, 2024 – July 1, 2025

Bargaining Unit Staff

• Due to HR on or by: July 31, 2025

MPP & Confidential Staff

Due to HR on or by: August 31, 2025

PerfEval@csumb.edu



Forms



Use the Correct Form

APC (Unit 4)

CSUEU (2, 5, 7, 9)

SUPA (8)

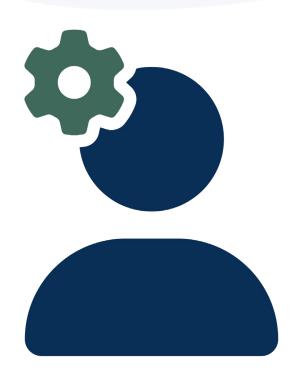
Teamsters (6)

Confidentials

MPP



Probationary Employees



There are separate requirements for probationary employees.

- **CSUEU:** at the end of the 3rd, 6th and 11th months
- APC, Teamsters, SUPA: Once during their first 12 months (usually at 6 months)

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



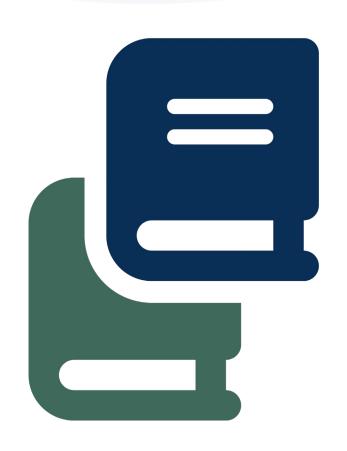
Remember



- 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 to PerfEval@csumb.edu



Additional Support & Resources



Contact HR (perfeval@csumb.edu) for:

- Previous years' performance evaluations*
- Employee position description*
- Questions about special scenarios

Webpage:

https://csumb.edu/hr/performance evaluation

HR Contact:

PerfEval@csumb.edu



