

# Performance Evaluations: Refresher

Human Resources



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**MONTEREY BAY**

# 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



# 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



# 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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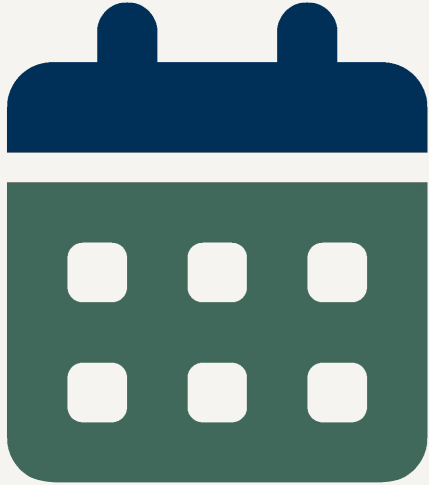
# Signatures & Sending to HR



- Adobe Sign:
  - Scanning/sending electronically
- Email:
  - Send to [PerfEval@csumb.edu](mailto:PerfEval@csumb.edu)



# Timeline and Due Dates



**Review Period: 7/1/23 - 6/30/24**

Bargaining Unit Staff

**Due to HR on or by: 7/31/24**

Confidential and MPP

**Due to HR on or by: 8/31/24**



# Forms

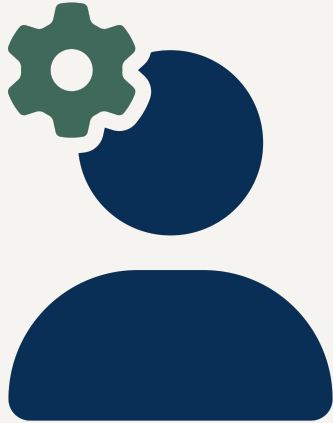


Make sure to use the correct form:

- [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](mailto:perfeval@csumb.edu)) for:

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

Webpage:

- [https://csumb.edu/hr/performance\\_evaluation](https://csumb.edu/hr/performance_evaluation)

HR Contact:

[perfeval@csumb.edu](mailto:perfeval@csumb.edu)

\*if you don't have a copy



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# Questions?



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