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| --- | --- |
|  | California State University Employees Union  2, 5, 7 and 9 Employees  Probationary employees are evaluated by the end of the third, sixth and eleventh month of the probationary period. Permanent employees are evaluated at least once a year as part of Dominguez Hills annual review process, which is on a July 1-June 30 cycle. The evaluator must submit a draft evaluation for the employee's review, and the employee has up to ten (10) days to review the draft evaluation and provide input, if any, to the evaluator. |

# Employee Performance Review

## Employee Information

| Name |  | Date: |  |
| --- | --- | --- | --- |
| Job Title |  | Review Period Permanent | July \_\_\_\_\_\_\_ to June \_\_\_\_\_\_\_\_\_ |
| Department |  | Review Period Probationary | 3 mo  6 mo  11 mo |
| Manager |  | Evaluator |  |

## Rating

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Job Knowledge: Demonstrates understanding of knowledge, skills, processes, equipment operation, procedures and resources necessary to perform the essential functions of the job and work assignments. | Needs Improvement | Satisfactory | Exceeds Expectations | Exceptional |

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| --- |
| Required Rating Justification: |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Quality and Productivity of Work: Demonstrates accuracy, completeness and follow-through of work, looks for ways to improve and promote quality, work is reliable. Demonstrates timely completion of work and works at sufficient volume to perform the essential functions of the job and the work assigned. | Needs Improvement | Satisfactory | Exceeds Expectations | Exceptional |

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| --- |
| Required Rating Justification: |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 1. **Problem Solving and Decision Making**: Ability to resolve problems independently, provide sound comprehensive solutions, exercises good judgment according to the essential functions of the job and the work assigned. Meets deadlines and achieves expected results. | Needs Improvement | Satisfactory | Exceeds Expectations | Exceptional |

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| --- |
| Required Rating Justification: |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Customer Service: Degree to which the staff member incorporates quality customer service with students, faculty, co-workers and the public. Includes telephone etiquette, friendliness, responsiveness and follow up with customers. | Needs Improvement | Satisfactory | Exceeds Expectations | Exceptional |

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| --- |
| Required Rating Justification: |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Planning and Organizing: Demonstrates self-management skills, including time management, planning, scheduling, prioritizing and completing work responsibilities and job assignments in accordance with expectations and job functions. | Needs Improvement | Satisfactory | Exceeds Expectations | Exceptional |

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| --- |
| Required Rating Justification: |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Responsibility and Flexibility – Accepts responsibility for assigned work and completed tasks. Commits to doing best possible job. Ability to adapt to new work conditions, surroundings, equipment, procedures and methods. | | | Needs Improvement | Satisfactory | Exceeds Expectations | Exceptional |
|  |  |

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| --- |
| Required Rating Justification: |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Initiative: Pursues activities independently which lead to the successful attainment of department or area objectives. Initiates changes when needed, identifying new methods and generating improvement. Identifies potential problems and works towards solutions. Looks for and takes advantage of opportunities. | Needs Improvement | Satisfactory | Exceeds Expectations | Exceptional |

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| --- |
| Required Rating Justification: |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Interpersonal Relations: Ability to work effectively with co-workers and other campus constituents. Able to participate and contribute in team assigned work. Refers to interactions that are part of regular assigned duties, not popularity. | | | Needs Improvement | Satisfactory | Exceeds Expectations | Exceptional |
|  |  |

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| --- |
| Required Rating Justification: |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| 1. **Communication Skills**: Effectively listens to, reads, and understands information; accurately retains and retrieves information; relays accurate, clear information in both written and oral form. (Mark the *overall rating in communication skills*)   2  1  Answers questions competently) | Not Applicable | Needs Improvement | Satisfactory | Exceeds Expectations | Exceptional |
| (a) Listening |  |  |  |  |  |
| (b) Written |  |  |  |  |  |
| (c) Oral |  |  |  |  |  |
| (d) Presentation |  |  |  |  |  |

|  |
| --- |
| Required Rating Justification: |

**Additional ratings for personnel in a lead position. Not Applicable**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 1. **Lead Skills**: **Mark the overall rating in Lead skills**   Answers questions competently) | Needs Improvement | Satisfactory | Exceeds Expectations | Exceptional |
| (a) Planning and Implementation: Ability to anticipate needs, plan and organize the work of others, ability to schedule/re-schedule work, meet production demands and adjust for changing priorities. |  |  |  |  |
| (b) Staff Development: Demonstrates the ability to effectively advocate the personal and professional growth of staff. Orientation of new employees, demonstrating methods and procedures. |  |  |  |  |
| (c) Effectively delegates: How well responsibility and authority are delegated to staff in order to promote the productivity and professionalism of staff. |  |  |  |  |
| (d) Decision making: Demonstrates the ability to identify problems, gather and organize facts, evaluate options and make reasoned and effective final decisions. Judgments and decisions made fairly, responsible exercise of authority. |  |  |  |  |
| (e) Leadership Skills: Demonstrates the ability to motivate others, to foster employee morale and satisfaction, create a climate that can meet organizational goals. Welcomes constructive criticism; open to feedback. |  |  |  |  |

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| --- |
| Required Rating Justification: |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Overall rating: | | | Needs Improvement | Satisfactory | Exceeds Expectations | Exceptional |
|  |  |

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| --- |
| Required Rating Justification: |

## Goals and Performance Planning

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| --- |
| **List the Employee’s Strength and Competencies:** |

**Employee Development and Goals Plan**

**(Goals for Performance Improvement required for any “Needs to Improve” rating)**

|  |  |  |
| --- | --- | --- |
| **Target Goals for Performance Improvement, Development or Enhancement:** | **Required Action Steps to Attain Targeted Goal:** | **Proposed Date or Timeline:** |
|  |  |  |

## Additional Comments

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| --- |
| **Comments:** |

## Verification of Review

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| *By signing this form, you confirm that you have discussed this review in detail with your supervisor. Signing this form does not necessarily indicate that you agree with this evaluation. The employee may choose not to sign and may submit an evaluation rebuttal to Human Resources at any time.* | | | | | |
| Employee Name |  | Signature |  | Date |  |
| Appropriate Administrator Name |  | Signature |  | Date |  |
| Division Vice President or College Dean Name |  | Signature |  | Date |  |

**Employee performance should be rated based on the following definitions:**

**Exceptional** Exceptional job performance. Uses creativity and analysis to improve services and methods. An innovator in the realization of University and department goals.

**Exceed Expectations** Exceeds requirements of position, working independently and effectively, meets individual and department goals.

**SATISFACTORY** Meets all requirements of the position, working with minimal supervision.

**NEEDS IMPROVEMENT** Employee has not yet demonstrated proficiency in all aspects of the job. Immediate supervisors will work with employees on proficiency improvement plans. Continued lack of improvement can lead to corrective action.

## Performance Evaluation Forms

The performance evaluation form is an important tool that encourages continued dialogue between supervisor and employee.  It is important to use the correct form agreed upon by the bargaining unit covering the employee.  Below is a list of current forms for CSUEU staff.

* CSUEU Permanent and Probationary Employee Performance Evaluation Form

## Performance Management System

The performance management system is an on-going and interconnected process designed to:

* Link individual contributions to organizational direction
* Provide a vehicle for on-going feedback and dialogue
* Ensure standards and expectations are communicated
* Acknowledge employee contributions and efforts

## Position Description Connection

The position description and previous evaluation goals are the basis of the performance evaluation.  The position description sets the expectations for duties and responsibilities, prioritizes tasks, and should be reviewed/updated annually and attached to the performance evaluation.

## Roles: Who Does What?

The following provides an overview of performance evaluation roles.

* **Lead** (Optional)
  + A Lead may be in the same collective bargaining unit as the employee.
  + A Lead may be asked to provide input to the performance evaluation.
  + For CSUEU employees, the lead may be present when the evaluator presents the evaluation to the employee.
  + Lead work direction involves organizing, scheduling, and assigning work; training and orienting employees; and providing input to employee selection and performance evaluations.
* **Evaluator**
  + Typically, an MPP or the Chair.
  + The evaluator should not be in a collective bargaining unit, with the exception of department chairs and sergeants.
* **Appropriate Administrator**
  + The appropriate administrator must be an employee classified as an administrator, which is, by default, part of the CSU Management Personnel Program (MPP).
  + The appropriate administrator is a position to which the employee has accountability within the unit, department, school, college, or division.
* **Supervisory Signature Authority**
  + Two different signatures--two levels of supervisory signature authority--should occur on all performance evaluations, one of which must be an appropriate administrator.
  + This “one-over-one” approval process is designed to protect the University and its managers from unintended liability/compliance issues and to ensure accountability.
  + Exception: For the second signature, Deans have been authorized to sign as the Provost's designee.