Staff Performance Evaluations

Center for Human Resources
Labor and Employee Relations

Presented by:

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SDSU

Performance Management

As defined by the CSU:

► Process by which supervisors and employees work together to plan, monitor, and review an employee's work objective and overall contributions to the work unit.

When planning, monitoring and reviewing employee performance, we must ask ourselves:

1. Have I clearly defined the expectations?

2. Have I described how performance will be measured?

3. Are my expectations realistic?

4. Have I checked that the employee understands the expectations?

5. If I have done the above items, what next?

Performance Evaluations are:

▶ Required by the CBAs of our rank and file staff

▶ An opportunity to discuss goals and areas that need improvement

▶ A chance for employees to self reflect and provide feedback to you about their performance

▶ A time for managers to reflect on how we are managing and what we can do to improve our style and the morale in our units

▶ An opportunity to update position descriptions, discuss classification issues or evaluate training needs

Performance Evaluations are not:

▶ Disciplinary

▶ Surprises - performance management should be happening all year long!

▶ Unilateral - employees should be given time to review and provide feedback

Best Practices

► Solicit employee feedback on their progress - not required of employees

► Meet with employees in person (or over Zoom); Union reps are not required for these meetings unless you reasonably believe the meeting could lead to discipline

► Set SMART goals and review them at least quarterly with the employee – Specific, Measurable, Attainable, Relevant, Timely

► For the areas that need improvement, offer ways that you can assist them in improvement: trainings, checklists, cross-training, etc.

CSUEU

(a) SUPERIOR: Total performance is far above normal standards for the position. Employee is making a superior contribution to the University. Superior or excellent performance should be noted in Section "B". Only a few employees would normally qualify for this rating.

(b) OUTSTANDING: Consistently competent performance exceeding standards in all critical factors for the position.

(c) SATISFACTORY: Meets the requirements of the position in a competent manner.

(d) MARGINAL: Total performance periodically or regularly falls short of normal standards. Specific deficiencies should be noted in Section "C" or in a signed, dated attachment.

(e) NOT SATISFACTORY: Performance clearly inadequate in one or more critical factors. Employee has demonstrated inability to improve or to meeting standards. Performance not acceptable for position held. Specific deficiencies should be noted with in Section "C" or in a signed, dated attachment.

APC

5 - Outstanding:

Total performance is far above normal standards for the position.

4- Exceeds Expectations:

Consistently competent performance exceeding normal standards in all critical factors for the position.

3 - Meets Expectations:

Meets all normal requirements of the position in a competent manner.

2 - Below Expectations:

Total performance periodically or regularly falls short of expectations. Specific deficiencies should be noted in Section D or in a signed and dated attachment.

1 - Unacceptable Performance:

Performance is clearly inadequate. Employee has demonstrated an inability or unwillingness to improve or meet expectations. Performance is not acceptable for position held.

Timelines for SDSU

► Early June - Letter from CHR with instructions, list of direct reports, and Adobe Sign forms to be filled out

► Evaluations Due: July 31, 2023

► Remember - Evaluations go through June 30, 2023 so be sure to cover the entire fiscal year!

SDSU Probationary & Temporary Performance Evaluations

Probationary Employees- All CBA Units

- Unit 1 – 12-months (evaluations should be completed at least once prior to the end of the probationary period)

- Units 2, 5, 7, 9 - 3-month, 6-month, 11-month

- Unit 4 - At least annually

- Unit 6 - 6-month, 11-month

- Unit 8 - 6-month, 9-month, 12-month

Temporary Employees - All CBA Units

- Periodic - at the least annually. Evaluations should be completed at least once during the appointment period or one-year after hire, whichever is earliest. Review appropriate CBA for details.

- Non-Represented Employees

- C99 - Annual or Periodic

- MPP - 6-month, 12-month in first year of hire, and annually thereafter (typically by June 30)

Evaluation Process

The Center for Human Resources has created a process for submitting performance evaluations via Adobe Sign workflow.

Performance evaluations for staff should be completed using the evaluation forms located on the CHR website, then routed for signature using the Adobe Sign workflow.

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Evaluation Process –
Complete the Evaluation Form

▶ Use the most recent PDF version of the appropriate evaluation form to complete the evaluation. Evaluation forms are located on the Center for Human Resources (CHR) Employee Evaluation website.

▶ Provide the employee with a draft of their evaluation via email prior (recommended) to or during your evaluation meeting.

▶ Make any necessary edits to the evaluation prior to initiating the workflow.

▶ Once the evaluation form is finalized, use Adobe Sign workflow for signatures and routing. *(The employee will have an opportunity to provide comments when signing the form.)*

Evaluation Process –
Route the Evaluation Form for Signatures via Adobe Sign Workflow

► Click the following link: [Staff Performance Evaluation Workflow](#)
  or
► Login to your Adobe Sign account using your SDSUid
  ○ From the home page click the "Start from library" button, then select "Workflows"
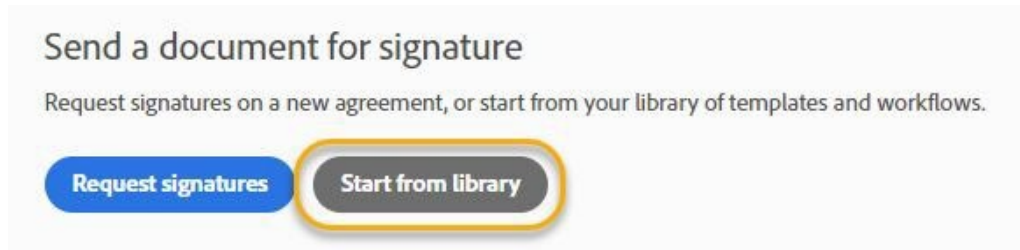
Evaluation Process –
Route the Evaluation Form for Signatures via Adobe Sign Workflow

► Enter the email addresses of all signers

CHR - Staff Performance Evaluation

How this workflow works?
Supervisor/Rater – enter the email address of the supervisor that completed the evaluation form.

more ∨

Recipients   ❓

Supervisor/Rater *

| ✒ | Enter recipient email | Enter the email address of the supervisor that completed the evaluation | ✉ ∨ Email |

Employee *

| ✒ | Enter recipient email | Enter the email address of the employee being evaluated | ✉ ∨ Email |

Administrator/Cabinet Officer *

| ✒ | Enter recipient email | Enter the email address of the appropriate administrator that should review and sign the evaluation | ✉ ∨ Email |

CC | Hide

Evaluation Process –
Route the Evaluation Form for Signatures via Adobe Sign Workflow

► The Document Name and/or Message may be customized to fit your needs

Document Name *

Staff Performance Evaluation

Message *

Please review and sign.

Evaluation Process –
Route the Evaluation Form for Signatures via Adobe Sign Workflow

► Attach the evaluation form/additional documents

    ► Click "Add File" next to "Evaluation Form" to attach the completed (unsigned) evaluation

    ► Click "Add File" next to "Additional Documentation" if you wish to attach any appropriate documentation to the evaluation

Files

Evaluation Form *	Add File
Additional Documentation	Add File

Send

► Click the "Send" button to route the evaluation for signatures

Evaluation Process –
Route the Evaluation Form for Signatures via Adobe Sign Workflow

► Once the evaluation form is signed by all recipients, <u>each recipient and the Center for Human Resources will receive a copy.</u> Please do not forward additional copies to CHR.

► If the employee refuses to sign and/or cancels the workflow, please contact HR Manager, Rachael Stalmann @ <u>rstalmann@sdsu.edu</u> assistance.

Additional Information/Resources

► For questions regarding evaluation ratings, appropriate documentation, etc., contact Associate Director of Labor and Employee Relations, Jeremiah Smiddy, at jsmiddy@sdsu.edu or your divisional resource management office.

► Forms and additional information: Center for Human Resources Employee Evaluation website.

► For assistance accessing your Adobe Sign account, contact The IT Help Desk at ithelpdesk@sdsu.edu

► Adobe Resources

   ► Adobe Sign - How to get started: https://helpx.adobe.com/sign/how-to/get-started.html

   ► Tutorials and best practices: https://helpx.adobe.com/sign/tutorials.html

   ► Instructional videos: http://gosign.adobe.com/jNbT0G1uT00UC2ENIr10i00

QUESTIONS?