INSTRUCTIONS FOR COMPLETION

USE: The Report of Employee Performance form is to be used for the evaluation of employees in Unit 4, Academic Support. Evaluations are conducted during the employee's probationary period and annually thereafter. The evaluator may wish to evaluate an employee more often than the prescribed intervals. When doing so, mark the box labeled Special. If space is inadequate, the evaluator may attach extra sheets containing comments, or Page 3 of this document provides additional space.

Section A: Check one column for each factor. When a factor is not considered applicable to a particular job or when the evaluator has not been able to observe the behavior, the category may be recorded as Not Applicable (NA). Check marks in Columns "1" and "2" require specific explanation in Section D. Record the overall performance in the section entitled Overall Evaluation, taking into account all factors and total performance over the period being evaluated. The Overall Evaluation should not be viewed as an average of all areas rated. The value applied to a factor may vary depending on the duties assigned to the position.

Meets Expectations: Meets all normal requirements of the position in a competent manner.
Exceeds Expectations: Consistently competent performance exceeding normal standards in all critical factors for the position.
Outstanding: Total performance is far above normal standards for the position.
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.
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. Specific deficiencies should be noted either in Section D or in a signed and dated attachment.

Section B: Describe outstanding qualities. Provide examples for check marks in Columns "4" and "5." (Attach additional sheets if necessary.)

Section C: Discuss progress or lack thereof toward achievement of goals during last rating period.

Section D: Discuss required improvement or correction. Provide examples for check marks in Columns "1" and "2." (Attach additional sheets if necessary.)

Section E: Record agreed-upon or prescribed performance goals for the next evaluation period.

Section F: Complete this section only if the employee is on probation. At any time during the probationary period, an employee may be rejected from further employment or, if permanent in another class, returned to that class. If the evaluator wishes to recommend rejection during probation, the evaluator must immediately notify the Office of _____. Consultation will be provided at that time.

RECOMMENDATIONS FOR COMPLETING THE EVALUATION PROCESS:

1. Prepare an initial draft of the Report of Employee Performance. Prior to meeting with the employee to discuss the draft Report, the evaluator may request the employee to complete a self-evaluation, which will also be discussed during the performance evaluation interview.

2. Provide the employee with a draft copy of the Report of Employee Performance prior to a performance evaluation interview and inform the employee of the date, time, place and purpose of the evaluation interview. The employee shall have 14 days to submit a rebuttal (if any) to the evaluator before the evaluation is finalized. During the interview, the evaluator should encourage the employee to discuss his/her opinions and observations regarding the content of the evaluation.

3. Upon completion of the evaluation interview, the Report of Employee Performance is completed in final form and signed by the evaluator. The Report is then given to the employee for signature. The employee may include comments on the form or may attach written comments, if desired, and return the Report to the evaluator. If the employee refuses or declines to sign the Report, the evaluator must indicate this under EMPLOYEE'S SIGNATURE OR ACKNOWLEDGEMENT. If the employee disagrees with the final performance evaluation, the employee may also subsequently submit a rebuttal statement that will be attached to the final performance evaluation in the employee's personnel file.

4. The Report of Employee Performance is forwarded to the reviewing officer for signature. The reviewing officer is an MPP manager to whom the evaluator reports unless the college or department has designated another manager to act as reviewing officer.

5. The completed Report of Employee Performance and any attachments must be copied and distributed by the evaluator as follows: **ORIGINAL**-to the Office of _____; **COPY**-to the employee being evaluated; **COPY**-to the department.

EVALUATOR -- BEFORE COMPLETING THIS REPORT PLEASE READ INSTRUCTIONS FOR COMPLETION

REPORT OF EMPLOYEE PERFORMANCE
UNIT 4 -- ACADEMIC SUPPORT
CSU Campus _____

NAME	EMPLOYEE ID	DEPARTMENT	CLASSIFICATION

FROM: _____ TO: _____ (RATING PERIOD)

Type of Evaluation: ☐ ANNUAL ☐ PROBATIONARY ☐ TEMPORARY ☐ SPECIAL

SECTION A - Evaluation Criteria

1	2	3	4	5	
					1 = UNACCEPTABLE **2 = BELOW EXPECTATIONS** **3 = MEETS EXPECTATIONS** **4 = EXCEEDS EXPECTATIONS** **5 = OUTSTANDING**
☐	☐	☐	☐	☐	Quality of Work
☐	☐	☐	☐	☐	Quantity of Work
☐	☐	☐	☐	☐	Professional Judgment*
☐	☐	☐	☐	☐	Contributions to Campus/CSU/Community*

*Per provision 18.1.A of the Collective Bargaining Agreement: Professional judgment includes professional responsibility, attendance abuse, and working relationships. Contributions include those to the community, which are directly related to the employee's work assignment.

SECTION B Utilizing the criteria above, record **JOB STRENGTHS** and superior performance. **(See Page 3 for more space, if necessary, for Sections B-E.)**

1	2	3	4	5	
					1 = UNACCEPTABLE **2 = BELOW EXPECTATIONS** **3 = MEETS EXPECTATIONS** **4 = EXCEEDS EXPECTATIONS** **5 = OUTSTANDING**
☐	☐	☐	☐	☐	**OVERALL EVALUATION** **Record Overall Performance**

This review is based on ☐ direct observation or supervision of the employee's work since the last performance evaluation… and/or… ☐ the content of the employee's personnel file. (Per provision 18.1.B of the Collective Bargaining Agreement)

SECTION C Record **PROGRESS ACHIEVED** in attaining goals established during previous rating period.

SECTION D Record specific **REQUIRED IMPROVEMENT** or **CORRECTION** needed in performance or behavior.

SECTION E Record **GOALS** or **IMPROVEMENT PROGRAMS** established for next performance period.

SECTION F For **PROBATIONARY EMPLOYEES**:

☐ **Permanent Status Recommended** (To be determined in conjunction with final probationary evaluation.)

☐ **Permanent Status Not Recommended** (To be determined not later than the final probationary evaluation in accordance with the INSTRUCTIONS FOR COMPLETION on Page 1.)

EVALUATOR

(Signature) (Title) (Date)

REVIEWING OFFICER

(Signature) (Title) (Date)

Date draft given to employee for review:

COMMENTS:

EMPLOYEE'S SIGNATURE OR ACKNOWLEDGEMENT: **DATE:**

EVALUATOR -- BEFORE COMPLETING THIS REPORT PLEASE READ INSTRUCTIONS FOR COMPLETION

REPORT OF EMPLOYEE PERFORMANCE
UNIT 4 -- ACADEMIC SUPPORT
CSU Campus _____

NAME	EMPLOYEE ID	DEPARTMENT	CLASSIFICATION

FROM: _____ TO: _____ (RATING PERIOD)

Type of Evaluation: ☐ ANNUAL ☐ PROBATIONARY ☐ TEMPORARY ☐ SPECIAL

SECTION B (continued) Record **JOB STRENGTHS** and superior performance.

SECTION C (continued) Record **PROGRESS ACHIEVED** in attaining goals established during previous rating period.

SECTION D (continued) Record specific **REQUIRED IMPROVEMENT** or **CORRECTION** needed in performance or behavior.

SECTION E (continued) Record **GOALS** or **IMPROVEMENT PROGRAMS** established for next performance period.

COMMENTS (continued)