

# **MANAGEMENT PERSONNEL EVALUATION PLAN**

## **Introduction**

The California State University Management Personnel Plan is designed to cover all California State University employees who have been designated as "Management" or "Supervisory" in accordance with the provisions of the Higher Education Employer-Employee Relations Act (HEERA).

## **Evaluation Plan**

The Management Personnel Plan necessitates that the President develop an evaluation plan outlining criteria and procedures for consideration of individual salary adjustments. Campus evaluation plans require standards of expectation for each grade level against which superior, average, or unsatisfactory performance can be gauged, and against which the amount of a pay increase, if any, can be determined. The evaluation plan requires criteria that will assure equity in pay based on merit factors, including quality, productivity, and the like.

Employees in the Management Group shall be evaluated after six months and after one year of service, and subsequently at one-year intervals. Evaluation shall also form the basis for recommendations for management development, professional leaves or other activities related to career development and upward mobility.

## **Objectives**

There are two general objectives of any evaluation plan. The first is to develop or improve performance and the second is to formulate a final judgment or assessment of performance to be used in making decisions, including merit pay, about management employees.

More specific objectives of the evaluation of management employees include, but are not limited to the following:

- To improve management accountability
- To identify and correct weaknesses
- To promote professional development
- To identify and reward performance which meets or exceeds established job standards or expectations

## **Criteria**

Certain criteria need to be considered in the promulgation of a campus management personnel evaluation plan, and include the following:

- The plan must be related to the mission and objectives of the university.
- The approach must be positive and focus on employee performance and accountability in relation to established job standards or expectations for certain positions.
- Evaluations must stress objective measures to the greatest extent possible, but will include subjective measures as well.
- Immediate supervisors must assume the primary responsibility for the evaluation.
- Those being evaluated must be fully informed of the procedures, timetable and results.
- The evaluation process must be reasonably time efficient and unburdensome.
- Confidentiality must be observed throughout the process.

## **Program Elements**

There are nine major elements to be considered in the overall performance evaluation, with two components for each element.

Value to the job, which has a numerical scale of 1 through 5, is one component designed to indicate the level of importance of each responsibility in achieving established goals and objectives. The other component is level of performance, with a rating scale ranging from unsatisfactory to outstanding.

Each rating should be supported with comments and/or examples which exemplify the rating.

Performance Factor: General Managerial/Supervisory Responsibilities

Each employee should be assessed relative to the listed performance factors as they pertain to that individual's position and performance. Not all of the descriptions for each factor are intended to be applied to each employee, nor are they an exhaustive list; they are intended to be illustrative. If a particular factor does not apply to the employee being evaluated, it should be marked "N/A".

### **Performance Definitions**

Unsatisfactory: Performance fails to meet minimum requirements of this position. Marked improvement is necessary.

Marginal: Performance meets some of the minimum requirements of this position. Generally indicates that additional training and/or experience is needed.

Satisfactory: Performance is completely and fully satisfactory and what is expected of an experienced, qualified employee.

Commendable: Performance is consistently above the requirements of the position even on some of the most difficult and complex parts of the job.

Outstanding: Performance is of an exceptionally high quality. Performance expectations are consistently exceeded.