

# YSU EVALUATION OF APAS BARGAINING UNIT MEMBER INSTRUCTIONS

(Article 12, 2003-06 YSU-YSU APAS Agreement)

**PURPOSE:** (Article 12.1) The purpose of the evaluation system described herein is to help bargaining unit members improve professional performance, record a formal evaluation of how well a bargaining unit member has performed his/her duties, provide for regular discussions about individual performance and improvement thereof, provide incentives for outstanding performance, and formal recognition of bargaining unit members who have done well, and provide those individuals responsible for making career decisions with information concerning the quality of an individual's work.

**FREQUENCY:** (Article 12.2) A non-probationary bargaining unit member will be evaluated on his/her performance once each year. The evaluation process will be conducted during January and will be completed by the evaluator by January 31st. A probationary bargaining unit member shall be evaluated on his/her performance at the end of his/her first six (6) months and at the end of each year of service until the completion of the probationary period. The evaluation period includes all work time covered since the last date an evaluation was due. A record of omission shall be included in each bargaining unit member's official personnel file and copied to the appropriate reporting channels when the process has not been completed as due. "Out of Cycle" evaluations are permitted as provided in Article 12 of the *Agreement*.

**METHOD:** (Article 12.2) The evaluation shall include a discussion between the bargaining unit member being evaluated and the evaluator, which includes a review of the bargaining unit member's position description and performance, before the evaluation form is finalized. The bargaining unit member shall also have an opportunity to review the evaluation form and shall sign the evaluation form. The bargaining unit member's signature shall certify that he/she has received the evaluation, but will not necessarily indicate agreement with it. The University will provide the bargaining unit member with a copy of the evaluation within fifteen (15) days after it is signed by the bargaining unit member.

**EXCLUSIVITY:** (Article 12) During the term of this *Agreement*, the evaluation procedure and instrument described in this Article (See Appendix F) shall be the only formal system of performance evaluation of bargaining unit members employed at YSU, except for the evaluated judgments required by the other provisions of this *Agreement*. Before being placed in the bargaining unit member's official personnel file, a bargaining unit member's evaluation will be signed off by the department head in situations where the evaluator is not the department head.

**OPTIONAL APPROACHES:** (Article 12.3) The following options may be initiated only by the bargaining unit member.

1) **Self-Evaluation:** The bargaining unit member being evaluated may prepare a narrative self-evaluation in which he or she reports and evaluates information related to job performance for the period being evaluated. If a self-evaluation is written, the evaluator reviews the self-evaluation, discusses it with the bargaining unit member, appends it to the evaluation form, and forwards it as part of the evaluation record. The evaluator may attach a written statement regarding the self-evaluation narrative.

2) **Record of Goals, Objectives and Activities:** In some instances, it is appropriate to record in writing goals, objectives and activities for the coming year. The bargaining unit member can attach a separate page itemizing this record. If a record of goals, objectives and activities is written, the evaluator reviews the record, discusses it with the bargaining unit member, appends it to the evaluation form, and forwards it as part of the evaluation record. The evaluator may attach a written statement regarding the record of goals, objectives and activities.

# YSU EVALUATION OF APAS BARGAINING UNIT MEMBER

Name \_\_\_\_\_ Date \_\_\_\_\_  
mm/dd/yyyy

Department \_\_\_\_\_

Title \_\_\_\_\_

Period covered by this evaluation \_\_\_\_\_

**NOTE TO THE EVALUATOR:** Read the instructions accompanying this form; then rate each characteristic below on the following pages by entering the appropriate letter on the line indicated under ratings; then provide information and comments regarding your rating in the space provided.

- |           |                        |   |
|-----------|------------------------|---|
| <b>O</b>  | = Outstanding          | The bargaining unit member has exceeded all of the performance expectations for this characteristic.                                  |
| <b>E</b>  | = Exceeds Requirements | The bargaining unit member regularly works beyond a majority of the performance expectations for this characteristic.                 |
| <b>S</b>  | = Satisfactory         | The bargaining unit member has met the <b>performance</b> standards for this characteristic.  |
| <b>N</b>  | = Needs Improvement    | The bargaining unit member has failed to <b>meet</b> one or more of the significant performance expectations for this characteristic. |
| <b>U</b>  | = Unsatisfactory       | The bargaining unit member has failed to meet <b>most</b> or all of the significant performance expectations for this characteristic. |
| <b>NA</b> | = Not Applicable       | The bargaining unit member is not rated on this characteristic.   |

<b>CHARACTERISTIC</b>	<b>RATING</b>
1. JOB KNOWLEDGE AND SKILLS:  demonstrates an understanding of the principles to meet the objectives of the job.	_____
2. PLANNING:  ability to plan and schedule appropriate objectives and activities.	_____
3. ADMINISTRATION:  completes appropriate objectives and activities.	_____
4. COMMUNICATION:  shares information with peers, subordinates, and superiors.	_____
5. RELIABILITY/PROMPTNESS:  can be depended upon to complete assigned tasks within established deadlines.	_____

<b>CHARACTERISTIC</b>	<b>RATING</b>
6. RELATIONSHIPS:  has good working relationships with peers and others.	_____
7. PROFESSIONAL DEVELOPMENT:  engages in activities to become or remain current in the field.	_____
8. OTHER (Specify):	_____
9. OPTIONAL APPROACH  <i>Refer to attached instruction sheet.</i>	Yes <input type="checkbox"/> No <input type="checkbox"/>

**Evaluator's Comments and Recommendations:**

Signature \_\_\_\_\_

Date \_\_\_\_\_

**Bargaining Unit Member's Acknowledgment (comments if desired):**

Signature \_\_\_\_\_

Date \_\_\_\_\_

*(Note: The bargaining unit member's signature shall certify that he/she has received the evaluation, but will not necessarily indicate agreement with it.)*

**Department Head (if other than evaluator)**

Signature \_\_\_\_\_

Date \_\_\_\_\_

**\*\*PLEASE RETURN COMPLETED EVALUATION TO HUMAN RESOURCES\*\***