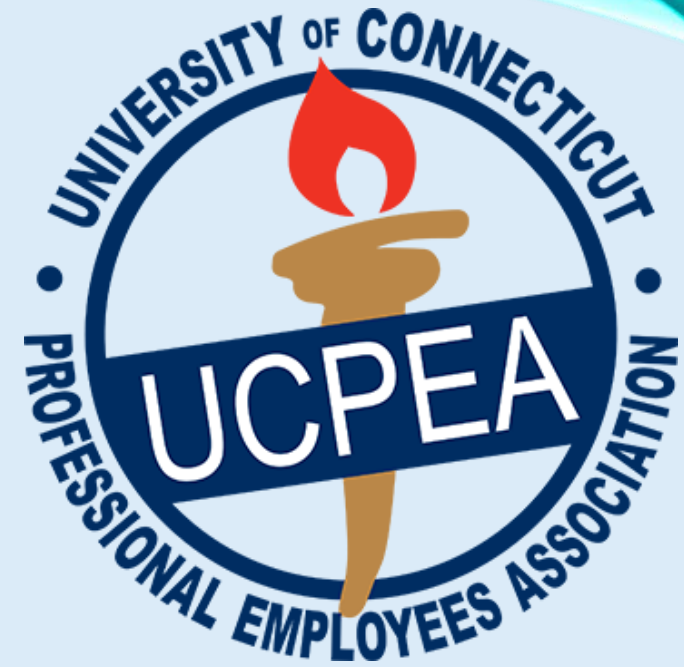


UCPEA EVALUATIONS

Advice from your Union



PREPARING FOR THE EVALUATION

STEP 1: THE ANNUAL REPORT OF ACTIVITIES AND ACHIEVEMENTS

- The Annual Report of Activities and Achievements is the best way to ensure that your accomplishments are recognized as a part of your evaluation.
 - The Annual Report is also an opportunity to self-advocate for discretionary compensation.
- All UCPEA members are encouraged to complete an Annual Report.
 - Some UCPEA members may be required to turn in an Annual Report. Supervisors must give 2 week notice of this requirement.
- Annual Reports are due on Wednesday, April 15th.
 - If a supervisor requires an earlier due date, they must provide at least 2 weeks.

PREPARING FOR THE EVALUATION

STEP 1: THE ANNUAL REPORT OF ACTIVITIES AND ACHIEVEMENTS

- There is no format for the Annual Report unless a supervisor requires a specific format. These are some ideas based on what has worked well for other UCPEA members:
 - Use the main categories on the evaluation form to format your Annual Report.
 - Create headings that emphasize the value of your work. For example: community outreach, cost saving initiatives, or student impact.
 - Write a narrative of your year, and attach examples of positive feedback from leadership, students, faculty members, etc.
- Do not forget to include examples of professional development.
- Demonstrate how you met last year's goals.

PREPARING FOR THE EVALUATION

STEP 1: THE ANNUAL REPORT OF ACTIVITIES AND ACHIEVEMENTS

- You should self-advocate for discretionary compensation within your Annual Report.
- Use the contract language to self-advocate:
 - 32.2 c: “The University performance-based compensation pool provided in this section is intended to reward those individuals who have sustained a level of performance that consistently exceeds the performance of their peers during the evaluation period, and that have advanced the mission and goals of the Department and University.”
 - 32.3 c: “One-time performance awards are made at the discretion of the University. The supervisor should consider the following types of accomplishments within the evaluation year in recommending an employee for such award: 1) Extraordinary job-related achievement, and/or 2) Completion of a specific and important Departmental or University goal or project.

PREPARING FOR THE EVALUATION

STEP 1: THE ANNUAL REPORT OF ACTIVITIES AND ACHIEVEMENTS

- It can be difficult to talk about your accomplishments. Most of us are not used to giving ourselves credit for our work.
- Have your co-workers look at your Annual Report and offer feedback. They are closest to your work and might remember accomplishments that you overlooked. Plus, it's always nice to hear positive feedback from the people you work with.
- Area Stewards are another resource for reviewing your Annual Report.
- Reach out to your Field Representative, Lindsay Jenkelunas, to review your Annual Report:
 - ljenkelunas@ucpea.org

PREPARING FOR THE EVALUATION

STEP 2: PREPARING FOR THE EVALUATION INTERVIEW

- Everyone experiences some anxiety about the evaluation interview.
- Spend time preparing for those areas where you may receive critical feedback. Be prepared to have an honest conversation about areas of improvement and have a plan to demonstrate improvement over the next evaluation year.
- If this is your first time being evaluated by this supervisor, ask your co-workers for feedback about what to expect.
- Most UCPEA members will be evaluated virtually this year, which is a new experience for all of us.
 - Prepare to conduct this virtual evaluation in a space that is quiet and free from distractions.
 - Carve out plenty of time.

PREPARING FOR THE EVALUATION

STEP 2: PREPARING FOR THE EVALUATION INTERVIEW

- Request your written evaluation ahead of time. It is not required that supervisors provide an advance copy, but most UCPEA members find that reviewing the evaluation ahead of time allows for a more productive evaluation conversation.
- It may be helpful to have relevant documents in front of you during the evaluation interview:
 - Your Annual Report of Activities and Achievements.
 - Your last evaluation.
 - Evidence of successful completion of goals.
 - Feedback from happy students, vendors, staff, faculty, etc.
- Goal setting should be a collaborative conversation during the evaluation interview. Come to the meeting with some goals in mind.
- Have a notepad ready. Sometimes the best strategy for receiving difficult feedback is to take notes, reflect on the information, and respond once you've had the chance to put your thoughts together.
- Do not feel pressured to sign the evaluation on the spot. The contract allows 7 days to return a signed copy.
 - The signature only indicates that you received the evaluation and had the opportunity to review with your supervisor. It does not indicate that you agree with the contents.

RESPONDING TO THE EVALUATION

STEP 1: ASSESSING IMPACT

- Overall Unsatisfactory evaluations have significant impact to your earnings and potentially to your career.
 - An overall Unsatisfactory is the only score that will prevent an employee from receiving a 4.5% general wage increase (3.5% from article 32.1 e., plus 1% from article 32.2 a.)
 - The University has a past practice of using 2 consecutive overall Unsatisfactory scores as evidence of a failure to meet satisfactory standards of job performance, and grounds for dismissal.
- The only evaluation score that can be grieved is an overall Unsatisfactory.
 - If you do receive an overall Unsatisfactory, please contact the UCPEA office.
 - Be aware that we must file a grievance within 35 days of when you received the evaluation.
- An overall In Needs of Improvement does not impact salary, but it may be an indication that you will receive an Unsatisfactory if there is not evidence of improvement.
 - If you receive an overall In Needs of Improvement, please reach out to the UCPEA office. UCPEA staff will work with members to document improved performance.

RESPONDING TO THE EVALUATION

STEP 2: CHECKING FOR INAPPROPRIATE INFORMATION

- Your evaluation should never include:
 - Any mention of FMLA entitlements
 - Any mention of an ADA accommodation
 - Any mention of Workers' Compensation
 - Co-workers names
 - For example, a supervisor may comment that your performance has exceeded that of your peers, but an evaluation should never say that Jennifer's performance far exceeded the work of Ryan.
 - Anonymous information
 - For example, if you gained a new supervisor in the middle of the evaluation year, it is appropriate for your new supervisor to gather feedback from your former supervisor. This feedback must be attributed. An evaluation should have feedback from someone other than your supervisor without attribution.
- If your evaluation does include inappropriate information, the document should be revised. Contact the UCPEA office for help removing this type of content.

RESPONDING TO THE EVALUATION

STEP 3: REFLECTING ON NEW GOALS

- Ideally goals for the next evaluation year will be mutually established. If you did not have the opportunity to set goals alongside your supervisor, ask yourself these questions:
 - Is this goal achievable?
 - Do I understand how success will be measured?
 - Is there a reasonable deadline for achieving this goal?
 - Do I have all the tools I need to meet this goal?
- If you answered no to any of these questions you should work with your supervisor to modify or clarify your new goals. Clear and reasonable goals should set you up for a positive evaluation experience next year.
- You can also add or amend goals throughout the evaluation year. Be sure to communicate about goals when priorities shift, or new opportunities present themselves.

RESPONDING TO THE EVALUATION

STEP 4: WRITING THE REBUTTAL

- Any UCPEA member can write a rebuttal to their evaluation.
- There is no deadline for submitting the rebuttal.
 - It is a good idea to submit a rebuttal within a few months of the evaluation, but it can always be submitted later if needed.
- Reasons for writing a rebuttal:
 - To correct misinformation.
 - To include overlooked achievements.
 - To respond to critical feedback.
 - To clarify information for the official record.
- Rebuttals should be submitted to your supervisor and to Human Resources.
 - You can always check your personnel file at HR to verify that your rebuttal has been added to your file.

RESPONDING TO THE EVALUATION

STEP 4: WRITING THE REBUTTAL

- Tips for writing the rebuttal:
 - Write a first draft for your eyes only. For some members, this is a good way to get your initial thoughts out even though emotions may be running high.
 - Write a second draft after you have given yourself some time to reflect on the evaluation.
 - One way to separate the contents of the rebuttal from the emotions behind it is to refrain from using your supervisors name. You can simply refer what was stated in the evaluation document or during the evaluation interview.
 - Ask a trusted co-worker, UCPEA Steward, or your UCPEA Field Rep to review your rebuttal.
 - Provide supporting documents: evidence of achievements, feedback from colleagues, praise from students or community members, etc.

CONNECT WITH YOUR UNION

- Your UCPEA Steward can lend support before and after your evaluation. If you are unsure of who your Steward is, email chiefunionsteward@ucpea.org.
- Reach out to the UCPEA office with any general questions: ucpeaoffice@ucpea.org
- Connect with your UCPEA Field Representative, Lindsay Jenkelunas, at: ljenkelunas@ucpea.org.