

MANAGING THE PERFORMANCE REVIEW PROCESS FOR REPRESENTED EMPLOYEES

Most of the collective bargaining agreements contain provisions regarding the timing and purpose of written performance reviews for career employees including:

- During a probationary period;
- Once per year following the conversion to regular status; and
- As the basis for granting some pay increases to performance rating of satisfactory or greater (applies to some but not all contracts and pay actions).

Answers to Common Questions Regarding Performance Reviews for Represented Employees

1. When should written performance reviews be conducted?

- Probationary Employees: The language of most of the labor agreements expects at least one written performance review prior to the completion of a probationary period. Usually, the review is done near the midpoint of the probationary period to allow sufficient time for the employee to adjust performance if needed.
- Regular Status Career Employees: The expectation is that a written performance review is prepared annually. It is important to note that in the contracts covering the Registered Nurse and Clerical units, there is specific language regarding notification of the employee about a performance deficiency in advance of the written performance process.

2. What is the performance review cycle for a represented employee?

- Timing of the annual (non-probationary) written performance review cycle is not specified in the collective bargaining agreements and constitutes a matter of past practice. This accommodates the timing preferences of individual campuses and departments.
- A department's action to change the timing for administering written performance reviews for represented employees should follow the procedures for changing a past practice. If a department is contemplating such a change, the department should contact their Human Resources Representative who will work with Labor Relations.

3. What form should be used to evaluate a represented employee?

- The performance review form to be used for represented employees is a matter of past practice. Some departments have department specific forms that have been in place and should continue to be used. Other departments use forms that have been approved by the unions for the entire campus.
- If a department manager wishes to change the performance review form currently in use for represented employees, such an action would be a change in past practice. The department manager should contact their Human Resources Representative who will work with Labor Relations.
- The campuswide forms for represented employees can be found at the following website address: <http://hrweb.berkeley.edu/performance-management/forms>. Under the section entitled *Instructions for Represented Staff*, campuswide performance review forms can be found for the following:
 - Performance Evaluation #1: Can be used for all represented employees except for employees in the Clerical Unit.
 - Performance Evaluation #2: Can be used for the Clerical unit.

Resources

Clerical Unit (CX) Contract:

- [Article 26 Performance Evaluation](#)
- [Article 29 Probationary Period](#)

Health Care Professional (HX) Contract:

- [Article 25 Performance Evaluation](#)
- [Article 28 Probationary Period](#)

Patient Care Technical (EX) Contract:

- [Article 27 Performance Evaluation](#)
- [Article 30 Probationary Period](#)

Police (PA) Contract:

- [Article 9 Probationary Period: Page 27](#)
- [Article 10 Performance Evaluation: Page 28](#)

Printing Trades (GCU) Contract:

Performance evaluations are a past practice not specified in the agreement.

Nurse (NX) Contract:

- [Article 9 Probationary Period](#)
- [Article 30 Performance Evaluation](#)

Resources continued...

Staff Research Support (RX) Contract:

- [Article 29 Performance Evaluation](#)
- [Article 32 Probationary Period](#)

Service (SX) Unit:

- [Article 26 Performance Evaluation](#)
- [Article 29 Probationary Period](#)

Skilled Crafts (KB) Unit:

Performance evaluations are a past practice not specified in the agreement.

Technical (TX) Unit:

- [Article 29 Performance Evaluation](#)
- [Article 32 Probationary Period](#)