



✓✓✓ CSUMB Performance Evaluation

● — Job Aid: Supervisor Checklist

Guidelines



Performance Cycle

- ✓ Continual process, not just an annual meeting
- ✓ Opportunity for staff to tell their story
- ✓ Aligns performance standards and goals for the next year



Effective Feedback

- ✓ Focus only on behavior that employees can control and change
- ✓ Be descriptive, not judgmental
- ✓ Give specific details about the performance
- ✓ Check to ensure the employee understands
- ✓ Solicit the employee's point of view
- ✓ Listen to the response



Conducting the Appraisal

- ✓ Allow adequate, uninterrupted time in a private space
- ✓ Avoid discussions of personality
- ✓ Mutually establish and communicate goals
- ✓ Focus on future performance
- ✓ Summarize all major points

Instructions - CSUEU, APC, Teamsters, SUPA

This checklist has been designed to support the 2023 Performance Review Cycle. Work backward from the due date based on the employee type.

[Performance Evaluation Webpage](#)

By July 31: HR gets the original signed with Rebuttal Statement and Self Eval attached (if provided by the employee).

By Aug 31: HR gets original signed Confidential & MPP evaluations

Step	Notes	Due Date
Inform Employee of Evaluation/Appraisal Process	APC (Unit 4) members get notified in writing – can be email	Prior to beginning the evaluation process
Provide Employee Self-Eval*	*Optional for employee to complete	



Draft Evaluation/Appraisal	May request HR assistance if needed	
Discuss Draft & Self-Eval* with Employee	Meet 1:1 with employee *Optional for employee to complete	
Employee Reviews Draft	CSUEU – up to 10 workdays APC – 14 calendar days Teamsters–up to 5 work days Employee may submit a rebuttal statement	
Discuss & Review input from Employee, including rebuttal	Meet 1:1 with employee	
Finalize Evaluation/Appraisal	May request administrator and/or HR assistance if needed	
Manager's MPP reviews & signs Final		
Meet with employee Both sign Final	Evaluator & Employee both sign final that is signed by Evaluator's MPP already. No additional edits should be made after employee signature	
Employee gets copy of signed Final	Employee may attach rebuttal statement	
Bargaining Unit Staff Evaluations sent to HR: PerfEval@csumb.edu	Original signed with Rebuttal Statement and Self Eval attached (if provided by the employee)	July 31
Confidential Staff and MPP sent to HR: PerfEval@csumb.edu	Original signed Confidential & MPP evaluations	August 31

Terms:

Teamsters/Confidential Performance Evaluation

Evaluator/Supervisor: employee's direct supervisor, who is writing the Appraisal

Appropriate Administrator: Evaluator's MPP

APC

Report of Performance

Evaluator: employee's direct manager, who is writing the Evaluation

Reviewing Officer: Evaluator/Manager's MPP

CSUEU/SUPA

Planning & Performance Appraisal

Evaluator/Supervisor: employee's direct manager, who is writing the Appraisal

Appropriate Administrator:
Evaluator/Supervisor's MPP