California State University SAN MARCOS | CSUSM Corporation

ANNUAL PERFORMANCE APPRAISAL AND 90-DAY PERFORMANCE APPRAISAL POLICY AND PROCEDURE

The CSUSM Corporation requires all supervisors to conduct performance appraisals on their current "Regular" employees ***annually*** and to use a fiscal year time frame (July 1st through June 30th) as the review period, or if requested by the Project Director, on a per project year time frame. Additionally, all newly hired Regular employees or current Regular employees that have recently been assigned a new position must have a performance appraisal conducted at ***ninety (90) days*** of employment. Supervisors can utilize the CSUSM Corporation's performance appraisal process for their *temporary* employees, but it is not mandatory.

POLICY GUIDELINES AND PROCEDURES: All Regular CSUSM Corporation employees are to receive performance appraisals according to the following guidelines:

- Each CSUSM Corporation supervisor is to conduct a written performance appraisal on all of their "Regular" employees at the following intervals:
  - at ninety (90) days of employment or at ninety (90) days after assignment to a new position; and
  - at least one (1) time per year;
- The written 90-Day performance appraisal form and the performance appraisal meeting is to be completed within two (2) weeks from the end of the employee's first ninety (90) days of hire or recent change in job assignment;
- For annual performance appraisals, the written performance appraisal form is to be completed and a performance appraisal meeting is to take place within forty five (45) days after the end of the employee's performance appraisal period (August 15th for fiscal year performance appraisals);
- Prior to completing the performance appraisal, the supervisor should request that the employee complete a self evaluation form. The employee's job description, principal duties, self evaluation and responsibilities are to be discussed with each employee during the performance appraisal meeting;
- In the case of unsatisfactory performance, the supervisor should contact the Human Resources Office for assistance well in advance of conducting the performance appraisal meeting;
- The Annual Performance Appraisal period *start dates* will begin with one of the following:
  - The start of the fiscal year
  - The start of each project (if requested by Project Director), or
  - The start of a new employee's employment or new assignment;
- Performance Appraisal *end dates* will either be the end of the fiscal year or project year or at the end of ninety (90) days of employment or new assignment;

- Any employee that is hired in the middle of the review period will receive an appraisal at the end of that review period for the length of service they have with CSUSM Corporation or will receive a 90-Day appraisal if appropriate;
- A written performance appraisal is required with every *promotion* or *equity adjustment* requested during the year. Review and approval by CSUSM Corporation must be given prior to any changes being made;
- All changes in employment will continue to be documented on the CSUSM Corporation's Employment Authorization Form (EAF);
- All documented performance appraisals will be submitted to CSUSM Corporation's Human Resources Office on or before the performance appraisal due date;
- Compensation guidelines are approved annually by CSUSM Corporation Board of Directors in May for the following fiscal year. These guidelines establish pay increase parameters, if funds are available;
- A positive performance evaluation does not guarantee an increase in pay, a promotion, or even continued employment annually or after the initial ninety (90) days of employment; and
- The terms and conditions of employment, including job assignments, transfers, promotions, and demotions, are determined by and at the discretion of the Executive Director of CSUSM Corporation.

For each performance appraisal, please use CSUSM Corporation's performance appraisal forms provided on our website at http://www.csusm.edu/uarsc/forms.html.