



Date: April 2024
To: Supervisors
From: The Office of Human Resources
Re: Performance Reviews for 2023-2024

This memorandum is a reminder that the period for conducting performance reviews for the year covering June 1, 2023 – May 31, 2024 is quickly approaching. For this review period, we will use the same process as last year which includes a standard review form. If a supervisor prefers to prepare the review in narrative form, please note that the narrative must cover each section that is represented on the standard review form, include ratings, and include an assessment of goals (and an articulation of goals for the coming year).

Supervisors will have from **June 1st through September 20th** to conduct reviews for every staff member. All reviews must be submitted to the Office of Human Resources by September 20, 2024. Employees who are on leave during the review period are expected to have a review conducted within one month of their return to work.

Any supervisors who need assistance or guidance on how to use the review form may contact the Office of Human Resources at (315) 792-3276 for a brief one-on-one session. In addition, a guide to using performance review form can be found at:

https://www.utica.edu/hr/media/pr/Performance_Review_Guide.pdf

The performance review form and associated information can be found at <https://www.utica.edu/hr/forms.cfm> under “Performance Evaluations Forms/Instructions”. In this section you will be able to access:

- Performance Review Form (fillable)
- Performance Review Guide
- Work Improvement Plan guide (“Needs Improvement” or “Unsatisfactory” ratings will require a work improvement plan)
- Goals preparation worksheet/guide (this can be used to report out on goal performance and future goals OR goal information can also be recorded directly in the review form)

NOTE: Fillable review forms should be downloaded before use, however remember to PRINT a copy of all completed performance review documents in the event that there is difficulty with saving the documents.

It is expected that an assessment of 2023-2024 goal outcomes will be incorporated into the overall review rating. Be sure to include evidence of prior year goal assessment when you complete and submit reviews to the Office of Human Resources. This can be done using the new form (there is a place for goal assessment and goal setting on the form) or via a separate document. You will also be working with your staff to create goals for the upcoming June 1, 2024-May 31, 2025 performance period. **Please note that documents submitted by September 20th will only be considered complete if they include information about goals.** This is an important part of the performance management process. In summary, each submitted review packet should contain:

- 1) the completed performance review document, with comments, and signed by both the supervisor and the employee;
- 2) a self-evaluation and evidence of activity from the University Engagement and Professional Development portal, if applicable (see below for more information);
- 3) a work improvement plan if the overall performance rating is “Needs Improvement” or “Unsatisfactory”;
- 4) an assessment of goal outcomes for 2023-2024; and
- 5) new goals for the 2024-2025 performance period.

Finally, please be reminded of the **University Engagement and Professional Development portal** which was launched as a way for employees track participation in professional development and community engagement opportunities, including activities related to diversity, equity, and inclusion. Staff are advised to enter their activities into the portal by 5/31/2024 so they can be reported as a part of the annual performance review. **Please remind your direct reports to bring their report from the portal to their annual review, or to include it in their self-evaluation.**

The Office of Human Resources recommends that you begin scheduling and conducting performance reviews as soon as possible to allow for enough conversation about current and future goals.

If you require any assistance or have questions about the performance review process, please contact the Office of Human Resources at (315) 792-3276.

Thank you.