



TO: UMass Chan Medical School Managers and Supervisors

CC: Department Heads, Department Managers, and Academic Administrators

FROM: Carolyn Brownawell, Dep. Exec. Vice Chancellor & Chief People Strategy Officer

DATE: April 14, 2023

SUBJECT: Performance Appraisal Program

At UMass Chan Medical School, our single greatest strength is our people—dedicated, engaged, and professional employees—whose daily efforts contribute so much to our special public mission and institutional success. We are committed to ensuring our employees have access to feedback to facilitate performance, professional development, and career growth. To this end, our annual performance appraisal program offers employees and managers a meaningful opportunity to engage in a constructive, collegial process to support performance and development.

During the review period—**which runs through Friday, June 16, 2023**—managers are responsible for conducting performance reviews and providing their team members with feedback, recommendations, and performance insights.

Please review the following important appraisal program elements:

- Use the [fiscal 2023 performance appraisal form \(click here\)](#).
- [Click here to access form instructions](#).
- The form, along with other resources, are available on the new [2023 Performance Appraisal Resource Hub \(click here\)](#) to support you and employees in this process.
- Completed performance appraisals for non-faculty employees, including SHARE and NAGE employees **are due to Human Resources by Friday, June 16, 2023**.
- Other unions should refer to their collective bargaining agreement.
- Performance reviews for faculty should follow the timeframe established by the Office of Faculty Affairs.
- Postdoctoral Fellows are excluded.

You will receive an email in the next couple of days from your Employee Relations Consultant with the list of employees that need to have a 2023 performance appraisal completed, along with instructions on where to send completed performance appraisals. In the meantime, should you have questions, please contact Matthew Lyford, assistant director of employee and labor relations, at Matthew.Lyford@umassmed.edu, or 508-688-0264.

TRAINING for EMPLOYEES

[Preparing for Your Performance Appraisal](#) will be available to employees via **Zoom and in-person training sessions** in April and May. This training is designed to help employees understand the performance appraisal process.

Note: Employee trainings are for non-faculty employees.

TRAINING for MANAGERS

[Performance Appraisal Tools for Managers](#) will be available to managers via **Zoom and in-person training sessions** in April and May. This training is designed to support managers with a review of the tools available to them in providing effective employee performance appraisals.

Registration for Manager Trainings

ONLINE TRAINING: Click to register for an online "Performance Appraisal Tools for Managers" session (pick a date that fits your schedule).

IN-PERSON TRAINING: Click to register for the in-person "Performance Appraisal Tools for Managers" session on May 17 (scroll to this date on registration page).

INDIVIDUAL DEVELOPMENT PLAN (IDP)

As a reminder, the optional [Individual Development Plan \(IDP\)](#) is available to you to help guide a discussion of your employee's development or career goals.

PROBATIONARY PERIOD REVIEWS

Any probationary review that was completed within a three-month (transfer, demotion, or promotion reviews) or six-month (hire or rehire review) period as of **Friday, June 16, 2023**, may be used in lieu of the annual performance appraisal, provided the probationary review remains an accurate reflection of the employee's recent performance.

If there has been a significant change in an employee's performance since completing the probationary appraisal, a new annual performance appraisal should be completed.
