



**Detailed Activity Timetable of Yale’s Performance Management Process**

| <b>STARTS</b> | <b>ACTIVITY</b>   | <b>ENDS</b> |
|---------------|---|-------------|
| JUNE          | Goal Setting – FOCUS forms completed<br>(note: ideally, many departments set new goals concurrently or soon after the annual performance assessment; end of September is the latest recommended date to have new goals in place for the upcoming fiscal year.   | SEPT        |
| NOV           | Mid-cycle status review discussions held  | JAN         |
| FEB           | The Human Resources Department communicates the merit process and timelines   | FEB         |
| APRIL         | The Human Resources Department develops and communicates salary pool and merit increase guidelines  | APRIL*      |
| APRIL         | <p><u>Performance Review and Merit Process</u></p> <ul style="list-style-type: none"> <li>• HR Generalists facilitate department meetings to plan and set internal timelines as necessary</li> <li>• Managers communicate performance management process to employees and request self-assessments</li> <li>• Employees complete self-assessments and return to manager</li> <li>• Managers solicit feedback from faculty, dual report, clients</li> <li>• Managers receive employee information, data and metrics</li> <li>• Managers prepare written reviews and assessments and develop recommended merit increases</li> <li>• Individual departments conduct 2nd level reviews and/or</li> <li>• Individual departments calibrate evaluation and merit recommendations</li> <li>• Departments submit performance ratings and merit recommendations to Division/School</li> <li>• FOCUS forms completed and signed off by</li> </ul> | MAY         |

|      |  |      |
|------|--|------|
|      | manager and 2 <sup>nd</sup> level reviewer (not yet discussed with employees)  |      |
| MAY  | HR Generalists/Division/School level review, calibration and approval completed  | JUNE |
| JUNE | Merit recommendations reviewed, analyzed, processed and provided by the Human Resources Department to appropriate Officer/Provost  | JUNE |
| JUNE | All approvals completed – Officer/Provost level  | JUNE |
| JUNE | <ul style="list-style-type: none"> <li>• Performance assessment and salary discussions take place (all salaries have final approval)</li> <li>• Signed performance assessments are sent to HR Generalists or department HR Representative to be filed in University employee file</li> </ul> | JULY |
| JULY | Merit increases are effective  | JULY |
| JULY | New salary amounts are reflected in end of July paychecks  | JULY |
| JUNE | New Annual Goals and FOCUS forms completed   | SEPT |

\* Dependent upon University Budget approval process