



Detailed Activity Timetable of Yale’s Performance Management Process

STARTS	ACTIVITY	ENDS
MID AUG	Goal Setting – FOCUS forms completed (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.	END SEPT
JAN	Mid-cycle status review discussions held	FEB
EARLY JUNE	The Human Resources Department develops and communicates merit timeline, salary pool and merit increase process and guidelines	EARLY JUNE
EARLY JUNE	Staff completes self appraisals	MID JUNE
JUNE	<p><u>Performance Review and Merit Process</u></p> <ul style="list-style-type: none"> • HR Generalists facilitate department meetings to plan and set internal timelines as necessary • Managers communicate performance management process to employees and request self-assessments • Employees complete self-assessments and return to manager • Managers solicit feedback from faculty, dual report, clients • Managers receive employee information, data and metrics • Managers prepare written reviews and assessments and develop recommended merit increases • Individual departments conduct 2nd level reviews and/or • Individual departments calibrate evaluation and merit recommendations • Departments submit performance ratings and merit recommendations to Division/School • FOCUS forms completed and signed off by manager and 2nd level reviewer (not yet discussed with employees) 	MID JULY

MID JULY	<ul style="list-style-type: none"> • HR Generalists/Division/School level review, calibration and approval completed • University Officers review 	END JULY
AUG	<ul style="list-style-type: none"> • Merit recommendations reviewed, analyzed, processed and provided by the Human Resources Department to appropriate Officer/Provost • All approvals completed – Officer/Provost level • HR prepares and delivers confirmation statements to Managers 	MID AUG
MID AUG	<ul style="list-style-type: none"> • Performance assessment and salary discussions take place (all salaries have final approval) • Signed performance assessments are sent to HR Generalists or department HR Representative to be filed in University employee file 	MID SEPT
END SEPT	<ul style="list-style-type: none"> • Merit increases are effective • New salary amounts are reflected in end of September paychecks 	END SEPT
MID AUG	New Annual Goals and FOCUS forms completed	END SEPT