



Timeline of Yale's Performance Management Process

RECOMMENDED START DATES	ACTIVITY	FINAL DUE DATES
6/1/08	Goal Setting – FOCUS forms completed (note: ideally, many departments set new goals concurrently or soon after the annual performance assessment; 10/31/08 is the latest recommended date for this fiscal year.	10/31/08
11/1/08	Mid-cycle status review discussions held	1/31/09
2/2/09	The Human Resources Department communicates the merit process and timelines	2/2/09
4/1/09	The Human Resources Department develops and communicates salary pool and merit increase guidelines	4/15/09*
4/1/09	<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 	5/15/09

	manager and 2 nd level reviewer (not yet discussed with employees)	
5/15/09	HR Generalists/Division/School level review, calibration and approval completed	6/1/09
6/1/09	Merit recommendations reviewed, analyzed, processed and provided by the Human Resources Department to appropriate Officer/Provost	6/15/09
6/15/09	All approvals completed – Officer/Provost level	6/25/09
6/25/09	<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 	7/25/09
7/1/09	Merit increases are effective	7/1/09
7/31/09	New salary amounts are reflected in end of July paychecks	7/31/09
7/1/09	New Annual Goals and FOCUS forms completed	8/31/09

* Dependent upon University Budget approval process