

## Timetable for Yale's Performance Management Process

START	ACTIVITY	M&P END	C&T   Local 34 END
<b>July</b>	<b>Goal Setting Process</b>  <b>Note:</b> Many departments set new goals concurrently or soon after the annual performance assessment. September is the latest recommended date to have new goals in place for the upcoming fiscal year.	Mid-Sept	Mid-Sept
<b>December</b>	Mid-year performance review discussions held	January	January
<b>February</b>	The Human Resources Department develops and communicates merit timeline, salary pool, and merit increase process and guidelines.	March	N/A
<b>Late March</b>	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 reports, and clients.	Early April	Early April
<b>April</b>	<b>Performance Review and Merit Process</b> <ul style="list-style-type: none"> <li>HR Generalists facilitate department meetings to plan and set internal timelines as necessary.</li> <li>Managers receive employee information, data and metrics. Managers draft written assessments for next level review and calibration.</li> <li>Managers and their supervisors work to finalize appraisals and merit recommendations for their staff. Calibration sessions take place to evaluate performance levels compared to agreed-upon objectives.</li> <li>Departments submit performance ratings and merit recommendations to Division/School for review and approval.</li> </ul>	May	*
<b>June</b>	HR Generalist/Division/School level review, calibration and approval completed. University leadership reviews and approves.	June	June
<b>July</b>	Merit recommendations reviewed, analyzed, processed and confirmed by the Human Resources Department and forwarded to the appropriate Leader/Provost.  Managers and employees meet to discuss performance appraisals and merit, effective July 1.  M&P salary changes are visible in Workday. Performance ratings are visible for all employees by end-of-month.	July	*

Updated March 12, 2021

\* Increases for Local 34 employees are determined contractually. Review and calibration process does not include merit or salary recommendations.