



2017 Implementation and Calibration Planning Form – Medical Center

This form summarizes the UCI Merit Program 2017 implementation and required calibration process with HR required and organization recommended completion dates. Responsible or involved stakeholders for each step are identified with an “X”. The boxes in the stakeholder columns indicate possible involvement determined by the leader or designee.

It is recommended that all organization leaders and managers/supervisors view the UCI Merit Criteria and Merit Calibration videos online available on the Human Resources Merit Program website (hr.uci.edu/partnership/merit) for more information and resources.

Step	Description	Recommend Complete By Date	Chief	Director	Manager / Supervisor	Employee
1	<p>Chiefs/Directors:</p> <ul style="list-style-type: none"> ▪ Communicates new UCI Merit Criteria to eligible employees ▪ Identifies and communicates to departments <ul style="list-style-type: none"> ✓ Who will participate in merit level calibration process ✓ Who will participate in merit percentage increase calibration process ✓ If there will be sub-merit increase guidelines within each merit level (e.g., 3 percentage levels in On Target merit level) ▪ Ensures managers/supervisors are trained on how to use the UCI Merit Criteria and Rating Guides to determine merit levels, and that they are reviewing the new criteria and rating guide with each employee and answering questions. ▪ Establishes and communicates process for Manager/Supervisor to report merit level recommendations. 	May 15	X	X	X	X
2	<p>Manager/Supervisor uses the new UCI Merit Criteria to assess each employee’s performance. They will use the employee’s completed performance evaluation to provide examples to support the merit level recommendation.</p> <ul style="list-style-type: none"> ▪ Manager/Supervisor will enter merit level recommendations on the UCI Manager Supervisor Merit Level and Support Information 2017 spreadsheet or other department merit tracking document. ▪ Manager/Supervisor emails completed document to their Director by their specified deadline. 	May 15		X	X	
3	<p>Chief/Director:</p> <ul style="list-style-type: none"> ▪ Prepares for calibration meeting inclusive of participants identified in Step 1 above. ▪ Reviews collated UCI Manager Supervisor Merit Level and Support Information 2017 or other department merit tracking document. ▪ Clarify with Manager/Supervisor any questions about employee merit level recommendations and support information. This will ensure discussion of all direct and indirect employees’ merit levels in the calibration meeting. 	May 15	X	X	<input type="checkbox"/>	



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4	<p>Chief/Director:</p> <ul style="list-style-type: none"> ▪ Schedules and holds Merit Level and Merit Award Calibration Meeting with participants identified in Step 1. See UCI Merit Calibration video online for recommended steps and activities. ▪ Clarifies meeting process and decision making: <ul style="list-style-type: none"> ✓ Reminds group that calibrated merit levels will be used to determine merit percentages. ✓ Reminds participants about confidentiality of all calibration discussion and documents. ✓ Ensures meaningful differentiation for top performers (see 2017 Merit Guidelines – 3% Merit Fund) ✓ Reminds participants that they should not share any information with employees until they receive HR approval. 	May 15	X	X	□	
5	Chief /Directors submit Distribution Spreadsheets to HR for first review.	May 15		X		
6	HR sends compiled distribution spreadsheets to Chiefs for final review and adjustment, if any.	May 22	X			
7	Chiefs return distribution spreadsheets to HR for final review and review with the Director/Manager/Supervisor any recommended merit recommendations that were changed/modified as submitted in Step 2.	June 2	X			
8	HR sends merit letters to Chiefs/Directors and notifies them that they may discuss increases with employees.	June 22	X	X	X	
9	Managers/Supervisors conduct Merit Notification Discussions using Merit Notification Letter, Merit Criteria Guide, and merit level support information used in calibration to determine level.	June 22 - 27		X	X	X