



Implementation and Calibration Planning Form – Campus/Health Sciences

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 school/division/department 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	Leader / Designee	Manager of Managers	Manager / Supervisor	School/Division/Dept HR Rep	Employee
1	<p>School/Division/Department Leader:</p> <ul style="list-style-type: none"> Communicates new UCI Merit Criteria to eligible employees Identifies and communicates to school/division/department <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. 	May 5 - May 12	X	X	X	X	X
2	<p>Manager/Supervisor uses the new UCI Merit Criteria to assess each employee’s performance during current merit period July 1, 2016 – March 31, 2017. 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 manager or the designated HR representative in their school/division/department by their specified deadline. 	May 5 – May 15		X	X	X	
3	<p>Calibration participants identified in Step 1 prepare for calibration meeting.</p> <ul style="list-style-type: none"> Review collated UCI Manager Supervisor Merit Level and Support Information 2017 or other department merit tracking document. Managers of managers/supervisors should clarify with their employee supervisors any questions about their employee merit level recommendations and support information. This will ensure that the manager of managers can discuss all of their direct and indirect employees’ merit levels in the meeting. 	May 12 – May 15	X	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	



Implementation and Calibration Planning Form – Campus/Health Sciences

Step	Description	Recommend Complete By Date	Leader / Designee	Manager of Managers	Manager / Supervisor	School/Division/Dept HR Rep	Employee
4	<p>Leader schedules and holds Merit Level Calibration Meeting with participants identified in Step 1.</p> <ul style="list-style-type: none"> ▪ See UCI Merit Calibration video online for recommended steps and activities. ▪ Leader 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. ✓ Reminds participants that they should not share any information with employees until they receive HR approval. 	May 15 - May 26	X	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
5	HR releases Working Merit Distribution Spreadsheets to leaders (final merit budget allocation confirmed)	No Action Required May 16	X			X	
6	Leader schedules and holds Merit Award Calibration Meeting with the participants identified in Step 1, ensuring meaningful differentiation for top performers. See 2017 Merit Guidelines – 3% Merit Fund	May 16 – May 30	X	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
7	School/Division/Department HR inputs merit levels and merit increases into Working Merit Distribution Spreadsheets . <i>Working spreadsheets will not be returned to HR.</i>	May 16 – June 8				X	
8	School/Division/Departments send to HR any merit exceptions to guidelines. Must provide written justification in a Word document.	Required Due to HR May 31	X			X	
9	Campus HR reviews exceptions and provides feedback to departments.	June 1 – June 9	X			X	
10	School/Division/Department HR transfers all final calibrated employee performance based merit levels and merit increases from Working Merit Distribution Spreadsheet onto the HR provided Input Merit Distribution Spreadsheet .	June 8 – Jun 11				X	
11	School/Division/Department leader approves final completed Input Merit Distribution Spreadsheet and submits to HR for final review.	Required Due to HR June 12	X			X	
12	<p>HR notifies school/division/department leader or designee that final merits have been reviewed, notification letters can be generated, and merit notification meetings can be held.</p> <ul style="list-style-type: none"> ▪ School/Division/Department HR representative will determine who will create the Employee Merit Notification Letters. ▪ Support information for recommended merit levels that were changed in calibration should be shared with manager/supervisor to use for Merit Notification Discussions. 	June 22	X	X	X	X	
13	Manager/Supervisor conducts Merit Notification Discussions using Merit Notification Letter, Merit Criteria Guide, and merit level support information used in calibration to determine level.	June 22 – June 30		X	X		X