## Performance Management and Annual Compensation Process Timeline, Training & Support

### Goal Setting and Growth & Development Plan

<table>
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| July      | ▪ As the key lead of managing the performance and compensation processes in your unit, ensure managers and employees have an understanding of the cycle, training and support, and expectations of their role in the process  
▪ Partner with unit managers to facilitate the annual goal setting process  
▪ Communicate with managers and employees about training and support | ▪ Work with unit Human Resources Partner to identify training to support employees  
▪ Support employee in setting individual goals for upcoming year:  
  - Communicate unit and departmental goals  
  - Schedule time with employee to draft and finalize goals that cascade from unit/departmental goals  
  - Set-up regular meetings to review goal progress and provide support  
▪ Set performance expectations for the upcoming year  
▪ Support employee in identifying development areas and activities that support growth of skills and knowledge needed to achieve goals  
▪ Work with employee to create an Individual Growth and Development Plan (IGDP) | ▪ Confirm understanding of unit and departmental goals  
▪ Work with manager to begin drafting individual goals that cascade from unit and departmental goals  
▪ Update goals and meet with manager to finalize goals and clarify performance expectations for the year  
▪ Work with manager to identify development areas and activities that support growth of skills and knowledge needed to achieve goals  
▪ Create Individual Growth and Development Plan (IGDP) |

### Training and Support

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<th>Resources</th>
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<th>Webinars &amp; Workshops</th>
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</table>
| Goal Setting and Performance Appraisal Form  
Goal Setting Kick-Off Communication Template  
Individual Growth and Development Plan and Guidelines | Goal Setting  
Individual Growth and Development Plan  
Introduction to the Performance Management Process | Performance Management and Compensation Cycle Launch Webinar  
Setting Performance Expectations Workshop |

Use these links to register for [e-learning Modules](#) or [Webinars & Workshops](#)
### Feedback & Coaching

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| **Ongoing** | • Encourage managers to hold ongoing developmental coaching discussions that guide future employee behavior and productive feedback discussions that constructively review past behavior and outcomes  
• Serve as resource to unit managers and employees | • Provide proactive coaching to guide employees as they begin new tasks or roles  
• Provide timely positive and constructive feedback to reinforce positive behaviors and results and to help employee reflect on learning points and alternative actions/behaviors  
• Encourage ongoing dialogue about performance, development and ways you can best support employee success  
• Keep notes/records to use as resource for Mid-Year Review and Annual Performance Appraisal  
• Keep employee updated about department priorities | • Actively participate in dialogue about performance  
• Suggest ways your manager can support your success  
• Accept feedback professionally and constructively  
• Keep abreast of departmental priorities |

### Training and Support

**Resources**
- Feedback and Coaching Guide  
- Seeking Feedback Guide  
- Ongoing Feedback and Coaching Webinars & Workshops  
- Feedback and Coaching Webinar  
- Coaching for Peak Performance Workshop  
- Giving Constructive Feedback Workshop  
- Motivating Others Workshop  
- Delegating for Results Workshop

**Resources**
- Feedback and Coaching Guide  
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- Ongoing Feedback and Coaching Webinars & Workshops  
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- Giving Constructive Feedback Workshop  
- Motivating Others Workshop  
- Delegating for Results Workshop

**Resources**
- Seeking Feedback Guide  
- Ongoing Feedback and Coaching Webinars & Workshops  
- High Impact Feedback and Listening Workshop

Use these links to register for [e-learning Modules](#) or [Webinars & Workshops](#)
## Performance Management and Annual Compensation Process Timeline, Training & Support

### Mid-Year Review

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<td>January</td>
<td>- Actively engage unit managers and support their mid-year employee discussions&lt;br&gt;- Use Mid-Year Review Discussion Guide to plan for and conduct the Mid-Year Review discussion&lt;br&gt;- Use Mid-Year Review Discussion Guide to prepare for and participate in the Mid-Year Review discussion</td>
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<td>e-Learning Modules</td>
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<td>- Mid-Year Reviews&lt;br&gt;- Mid-Year Review - HR Community Webinar&lt;br&gt;- Planning your Professional Development Webinar</td>
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# Performance Management and Annual Compensation Process Timeline, Training & Support

## Performance Appraisal and Rewards & Recognition

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| **May-June**  | ▪ Partner with unit managers through annual compensation process to facilitate pay and performance decision making  
                 ▪ Partner with unit managers and encourage them to facilitate year-end performance discussions, and to communicate pay decisions to employees prior to pay effective dates | ▪ Ask employee to complete employee comments sections of the Performance Appraisal  
                 ▪ Draft Performance Appraisal  
                 ▪ Review draft Performance Appraisal with next level manager to finalize content, ratings and base pay recommendation  
                 ▪ Make base pay recommendations for employees  
                 ▪ Finalize Performance Appraisal  
                 ▪ Schedule and conduct Performance Appraisal meeting  
                 ▪ Communicate base pay decision to employees  
                 ▪ Provide signed copy of Performance Appraisal to unit and University Human Resources | ▪ Consider performance for year and progress against goals  
                 ▪ Complete employee comments section of the Performance Appraisal  
                 ▪ Prepare for Performance Appraisal meeting  
                 ▪ Actively participate in Performance Appraisal meeting  
                 ▪ Sign completed appraisal and retain copy  
                 ▪ Confirm understanding of feedback and action items |

### Training and Support Resources

- **Resources**
  - Annual Compensation Process 3-Part Informational Series & Toolkit
  - Performance Appraisal Best Practices e-Learning Modules
  - Performance Appraisals Webinars & Workshops
  - Annual Compensation Process Open Laboratories
  - Performance Management and Compensation Cycle –Leading the Year-End Appraisal Process HR Community Webinar

- **Resources**
  - Employee Base Pay Letter Template
  - Performance Appraisal Best Practices e-Learning Modules
  - Performance Appraisals Webinars & Workshops
  - Performance Appraisals-Overview
  - Giving Constructive Feedback

- **e-Learning Modules**
  - Performance Appraisals Webinars & Workshops
  - Communicating with Impact

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