

FAQs - Annual Staff Evaluation and Merit Process

These questions were gathered from the Reed community in Spring 2024, along with responses from the Senior Staff Compensation Working Group.

1. Question: Why are we changing the evaluation form?

Answer: We heard staff concerns last spring that there was dissatisfaction with the merit process. There was a general lack of understanding of how merit increases were awarded. A new evaluation form will reset how evaluations are done across the college and ensure that at a minimum, all staff will have the same elements addressed within the process.

We also acknowledge that no form is optimal for all. This is a change. There may also be future changes once we have had a chance to use the form for several cycles.

2. Question: What are the goals of this work?

Answer: Increase staff member engagement and satisfaction with the annual review process. Increase transparency between staff, supervisors, and division leaders. Clarify the relationship between the evaluation process and merit.

3. Question: Who is making this decision? How are you getting input?

Answer: The Working Group from Senior Staff is preparing a recommendation for the President's staff consideration. The working group includes Erik Bernhardt, Gary Granger, Dena Hutto, Mike Tamada, and Lynn Valenter.

The working group presented at Senior Staff and asked supervisors to meet with their working groups and provide feedback. We held two listening sessions and sent a survey out to all staff and received more than 200 responses. Based on this input, we prepared a draft evaluation form and FAQs.

4. Question: Why is the college mandating the use of one form when we previously could do as we chose?

Answer: Practices varied widely, making it difficult to administer equitably. With everyone using one form, there is a baseline standard applicable to all staff for evaluations that improves process equity. Departments and/or divisions may supplement the college form.

5. Question: So how do the new evaluation process and form impact merit increases?

Answer: The primary purpose of the merit pool is to reward exceptional performance during the past year. Merit increases will be informed by several criteria within the process. One factor is the evaluation form. Other elements are under development, but may include positive contribution to culture, and employee's experience compared to internal peers.

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6. **Question: You asked us about seven elements of the form. What was the outcome of the survey?**

Answer: We had more than 200 responses, with over 75 comments. The working group read each individual comment. All of the elements had more staff supporting than not supporting. The element with the least support was the question in the self-evaluation about contribution to the mission of the college. After review and comments and discussion at the working group, we have eliminated that question from the proposed form. The other elements are incorporated. We also had multiple suggestions about including what the supervisor could do to support the employee. We have added this element to the draft self-evaluation form.

7. **Question: How is merit pay allocated? Will this change?**

Answer: Merit pay is allocated based on a percentage of salaries in each division. This percentage is included in the budget that is approved by the Board of Trustees each spring for the next fiscal year (beginning July 1). Historically, salary increases have been effective beginning July 1. Each Vice President/Dean area receives the same percentage of available merit pay calculated in dollars for their division and has discretion as to how merit increases are awarded. In all cases, recommendations are made to the VP/Dean who has the final responsibility for merit allocations. Merit increases range from 1-5% of base salary.

We are not proposing change to this part of the process.

8. **Question: How do VP/Deans make decisions about allocating merit awards when they may not be familiar with all the individual employees who are eligible within their divisions?**

Answer: VP/Deans rely on the recommendations of supervisors/managers who are the most knowledgeable about the staff member's work, typically through an iterative dialog.

9. **Question: Previously, the annual Goal Development form was distinct from the merit process, except that a completed form had to be on file for a staff member to be eligible for a merit increase. Is the evaluation form considered in the merit allocation?**

Answer: The evaluation form will be one of the elements (see Question 5 for details) considered in developing merit allocation recommendations. This will increase transparency by including the discussion between the supervisor and staff member.

10. **Question: The merit process is not well understood and seems to be a system of favoritism and subjectivity. How does this process change that?**

Answer: It is impossible to remove all subjectivity from the process; however, developing a consistent and transparent evaluation process is one way to minimize subjectivity. Supervisors are expected to have meetings with staff, using standardized forms, as part of determining merit recommendations. The VP/Deans who review supervisor

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recommendations are the next level of support for a process as they critically evaluate supervisor recommendations.

11. **Question: Why don't we just eliminate merit pay?**

Answer: We want to be able to continue to reward high-performing individuals. The merit pool is not so sizeable that it creates large disparities in annual salary increases, while still allowing for some modest differences based on the stated criteria.

12. **Question: Why don't I get to evaluate my supervisor? Why don't we solicit letters of assessment from others? We need a 360 degree process.**

Answer: While a well-designed and thoughtful 360 degree process may add value to overall assessment of performance, this is not a goal within the current process. It could be considered in the future.

13. **Question: So what is the overall process?**

- HR will send out reminders to all staff to provide an optional self-evaluation to their supervisor that may include proposed goals for the calendar year.
- The employee will give their supervisor their completed self evaluation form by the supervisor-determined due date, likely in March of each year.
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- The supervisor and staff member will work together to identify goals for the next year and review the goals from the prior year.
- Then each party will sign the supervisor form. Both the supervisor form and self-evaluation form will be uploaded into Etrieve no later than April 1st of each year
- The VP/Dean of the employee area has access to the evaluation form for awareness.
- Letters documenting salary increases are distributed electronically in June.

14. **Question: What is included in the self-evaluation form?**

Answer: While not required, the self-evaluation form is intended to provide a framework for staff to share their assessment of their performance with their supervisor. Elements that may be included are a discussion of last year's goals and outcomes, proposed goals for the current year, summary of major accomplishments, and any requests for support of professional development. It can be as short as the staff member desires; the supervisor may provide suggested maximum length. The college is not requiring the self-evaluation form as part of the central process; individual supervisors or units may require this or other forms as part of the process.

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15. Question: What is included in recognition of accomplishments?

Answer: This is where the supervisor highlights major accomplishments over the last year. It may include some or all of the accomplishments noted in the staff member self-evaluation. This is an opportunity to recognize and celebrate major accomplishments over the past year. It is not intended to document every accomplishment.

16. Question: What is meant by quantity and quality of work? Isn't this part of goals or accomplishments?

Answer: This is where a discussion about job performance reflected in the job description occurs. This discusses the core elements of job performance. This should be a "no surprises" discussion, where items addressed are not brought up for the first time. There may be overlap with content of other sections, but job performance discussion is an important element for equity and transparency.

17. Question: What is meant by opportunities for professional development?

Answer: Professional development is interpreted in the broadest sense. Reed offers some classes that can provide attendees with benefits. Some departments fund training sessions or bring in speakers. There are resources online and in the library that may provide professional growth. On-the-job training applies, as does peer mentoring. Targets for professional development should be discussed and agreed upon in the evaluation discussion. Reed is also a member of a number of higher education associations, many that provide online training at low or modest cost.

18. Question: If I don't meet my goals, will I be penalized? Does that make me ineligible or less competitive for merit?

Answer: The goals are only one element of the evaluation form. The evaluation form is one of the elements of the considerations for merit increases. The supervisor in conjunction with the VP/Dean will recommend and award merit. Not meeting a goal does not disqualify an employee from merit increase.

19. Question: What if I don't agree with my supervisor's assessment?

Answer: As with the current form, signature does not imply agreement, just that the parties have had a discussion. The current form does not provide for staff member documentation of difference, but email or other communication could be provided.

20. Question: We received several recommendations for qualitative improvements.

Answer: The annual staff evaluation process has been updated and resources on our website reflect the changes.

21. Question: Will there be training for supervisors on the new process?

Answer: Yes. Human Resources will offer open office hours to provide support and answer questions from supervisors.