**NCTA Annual Staff Merit Recommendation Process**

**Introduction:**

This process is intended to recognize NCTA staff accomplishments and to assist staff in improving their effectiveness and efficiency. The *NCTA Annual Merit Recommendation Form* (Merit Form) was developed to bridge the Staff Performance Management process to the annual Merit Increase Process. The *NCTA Annual Merit Recommendation Form* is completed using the information developed during the conversations between staff and supervisors as part of the NCTA Staff Performance Management process in ReviewSnap. A presentation with detailed information and instructions on how to complete the Merit Form should be reviewed prior to completing a Merit Form. The presentation is located at <http://ncta.unl.edu/faculty-staff-handbook-policies>.

During the annual staff merit recommendation process, supervisors will place employees into one of three categories: *Exceeds Expectations,* *Fulfills Expectations,* or *Did Not Meet Expectations.* Conversations between the employee and supervisor, made during the previous year as part of the the ReviewSnap process, will assist the supervisor in determining if an employee met expectations for the year, did not meet expectations, or exceeded expectations.

The majority of the employees (+/-90%) will fall in the *Fulfills Expectations* category. Additional justification is required for each employee placed in the categories *Exceeds Expectations* or *Did Not Meet Expectations*. Documentation to support this recommendation must be available but does not need to be attached to the form. If an employee *Exceeds Expectations* or *Did Not Meet Expectations*, the written record of performance conversations in ReviewSnap should display evidence supporting the recommendation. The electronic ReviewSnap records may be supplemented with additional documentation for each employee placed in the category *Exceeds Expectations*, or *Did Not Meet Expectation*.

Supporting documentation is encouraged but not required for employees placed in the category *Fulfills Expectations*. The electronic ReviewSnap conversations may be referenced as supporting documentation for employees placed in this category*.*

Final merit increase decisions will be made by the NCTA Dean after considering recommendations from all college units.

If funds are available for merit raises, staff in the *Fulfills Expectations* category will receive 80% of the raise percentage received by staff in the *Exceeds Expectations* category. For example, if funds are available to provide a 2.5% merit raise for staff in the *Exceeds Expectations* category, staff in the *Fulfills Expectations* category will receive 80% of that amount, or 2.0%. Staff in the *Did Not Meet Expectations* category will not receive a merit raise. All funds available for merit raises to a category of employees will be allocated to those employees.

Supervisors should consider these *Staff Performance Expectations* while conducting staff performance management conversations. Supervisors may then use this information as guidance when filling out the *NCTA Annual Merit Recommendation Form*.

* Work is thorough and accurate.
* Accomplishes goals in a timely manner.
* Demonstrates knowledge and skills needed to fulfill job responsibilities to complete duties.
* Works well with other employees and creates a positive work environment.
* Communicates in an effective and productive manner to subordinates, superiors, students and others.
* Shows ability to assess project/program needs and effectively use all resources available.
* Is dependable in performing job duties and responsibilities.
* Practices and adheres to affirmative action principles, policies and goals.
* Performs duties in a way that enhances a positive environment for students on campus.

**Steps for Supervisors:**

1. **Merit Form is Distributed**

* The form will be sent to supervisors by the NCTA Business Office by March 20 each year. The form can also be found at <http://ncta.unl.edu/faculty-staff-handbook-policies>.

1. **Complete the Merit Form**

* The form should be completed by the immediate supervisor using all performance-related information sources available to them since the last merit form was completed. One form should be completed per supervisor.
* All regular, fulltime staff employees you supervise should be listed on the form in one of the three areas:

1. *Exceeds Expectations*
2. *Fulfills Expectations*. (The majority of employees (+/-90%) will be placed in this section.)
3. *Did Not Meet Expectations*
4. **Return the Merit Form**

* The Merit Form is a “summary” document and it is critical that any merit recommendation is supported by back-up documentation. Supporting documentation is required for each employee placed in the category *Exceeds Expectations*, or *Did Not Meet Expectation*. Supporting documentation is encouraged but not required for employees placed in the category *Fulfills Expectations*. The ReviewSnap performance management conversations may be referenced as supporting documentation for employees placed in the category *Fulfills Expectations.* The ReviewSnap performance management conversations may also be supplemented with additional performance related documentation for each employee placed in the category *Exceeds Expectations*, or *Did Not Meet Expectation*.
* Return the form electronicallyto the Business Office by April 15**.**

**Action, timeline and responsible party**

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| **Timeline** | **Responsible Party** | **Action** |
| March 20 | HR Office | Notify supervisors of process timeline and access to *Annual Merit Recommendation Form* |
| March 20-April 10 | Supervisor | Review conversations in ReviewSnap for each staff member. Supervisor uses *staff performance expectations* to help them determine if each employee did not meet expectations, fulfilled expectations, or exceeded expectations. |
| April 10-15 | Supervisor | Submits *NCTA Annual Merit Recommendation Form* to HR Office along with documentation of support for employees not meeting expectations or exceeding expectations. |
| April 15-20 | HR Office | Submits *NCTA Annual Merit Recommendation Forms* to Executive Staff |
| April 20-28 | Exec Staff | Executive staff reviews and approves or makes recommendations |
| April 28-30 | HR Office | Submits Annual Merit Recommendations to IANR Budget Office. |

**NCTA Annual Merit Recommendation Form**

Supervisors submit this document electronically to the HR office along with supporting documentation by April 15. Supervisors may add additional lines if necessary.

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| --- | --- |
| **Supervisor** |  |
| **Division or unit** |  |
| **Date** |  |

**EXCEEDED EXPECTATIONS:**

These employees consistently exceed expectations with **performance above and beyond the majority of their peers**. Only a few employees in the workgroup should exceed expectations and it is possible there won’t be any employees listed in this section. For each employee listed, please provide justification to support the recommendation.

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| --- | --- |
| **Employee Name** | **Justification (required)** |
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**FULFILLED EXPECTATIONS:**

These employees consistently meet expectations **and are high quality performers**. The majority of employees in the workgroup should be listed in this section. No additional justification is needed for these employees.

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| **Employee Name** | **Justification (optional)** |
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**DID NOT MEET EXPECTATIONS:**

These employees have areas of **needed improvement**. It is possible there won’t be any employees listed in this section. Documentation must support this recommendation and it should not be a surprise to the employee. For each employee listed, please provide justification to support the recommendation.

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| **Employee Name** | **Justification (required)** |
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