

UNIVERSITY OF OREGON
Division of Undergraduate Studies
Merit Increase Criteria and Procedures for Officers of Administration and NTTF

Policy document for Review Period January 1, 2008 – March 15, 2014

Merit increases are given for performance that fully meets and typically exceeds the position requirements, demonstrating excellence, initiative and creativity -- as well as a commitment to the overarching objectives of the department, the division and the University.

In Undergraduate Studies, all NTTF and OAs are evaluated according to the same four-point scale, although the criteria measured by means of that scale may vary department by department. Three or four criteria are used in UGS departments; in all departments the criteria are weighted equally in the review process.

Merit review evaluations are based on performance evaluations for all UGS employees; these evaluations begin with a self-evaluative process, typically accompanied by a written 1-2 pp report on professional activities although the precise nature of materials submitted may vary unit by unit. UGS directors are encouraged to determine the type of self-evaluation that works best for the purposes of their unit(s) and staff and are also responsible for insuring compliance within their unit with the 2013-15 Collective Bargaining Agreement between the University and United Academics (Article 19; Section 3 and 4). As relevant, an employee's self-evaluation may or may not also include a c.v. as well as any pertinent material that is not captured in the c.v. (e.g. publications, teaching evaluations, etc). Performance evaluations occur on a timely basis, typically annually. Department merit review policies remain available to review on line on the Academic Affairs website or at the Division of Undergraduate Studies Administration office.

Employee self-evaluations typically form the basis for discussions between employees and their immediate supervisors. Following these discussions, the supervisors write evaluative summaries. Along with the employees' self-assessments, these are submitted to relevant department directors. Employees have the right to respond in writing to anything included in their supervisors' evaluations. Finally, department directors submit copies of all documentation to the Vice Provost.

Merit increases are determined subsequent to performance evaluations. During an initial review, the directors of the Division's four service departments (AEC, FYP, OAA, TLC) will determine merit increases within their units, and the Vice Provost will determine raises within Admin and for each department director in turn. For a second-stage review, the Vice Provost in consultation with the directors will review all proposed increases in order to discuss division-wide concerns with extraordinary merit – as well as concerns with retention, equity, salary inversion and/or compression. This executive-level review will enable strategic discussion of human resources directed toward achieving more competitive, equitable and just compensation over the long haul for all UGS staff.

After completion of the executive-level review, merit decisions will be documented via a spreadsheet available for review at the Division of Undergraduate Studies Administration office, and in a brief memo encapsulating decisions regarding extraordinary merit and/or concerns with retention, equity, inversion and/or compression. This memo will be submitted in a timely fashion to the Vice Provost for Academic Affairs. Individual employees will be informed regarding their own merit raises by campus mail, via timely letters of notification from the Vice Provost for Undergraduate Studies.

MERIT RANKING SCALE FOR UNDERGRADUATE STUDIES:

0- Unsatisfactory

Performance fails to meet job requirements on a consistent basis.

1- Fully satisfactory

Performance fully meets job requirements on a consistent basis.

2- Very good performance

Performance frequently exceeds requirements, demonstrating initiative and producing at a very high quality level.

3- Unusually good performance

Performance consistently exceeds requirements, with minimum supervision and/or direction. Achievements are well beyond those expected at this level; production at a superior quality level.

**Undergraduate Studies Administration
Merit Increase Criteria**

Performance of core job responsibilities:

Manages job duties with the ability to prioritize and organize tasks accurately and efficiently. Consistently meets deadlines, develops short and long term goals, develops appropriate solutions, consults with colleagues/supervisors as needed and makes decisions in a timely manner. Demonstrates collegiality and a strong collaborative ethic.

Service to the Division and the University:

Demonstrates understanding of and commitment to the missions of both Undergraduate Studies and the University overall. Seeks opportunities to expand knowledge of and participation in broader University contexts. Builds relationships and partnerships across the Division and across campus, integrating the goals of the unit into overarching Division and University objectives.

Professional Development:

Demonstrates pride and ownership in one's core duties by seeking opportunities for professional development and job growth. Actively embraces opportunities for feedback and critique in order to develop skills and competencies. Attends and/or participates in learning opportunities and training. Shares acquired knowledge with other staff as relevant; integrates new learning into workflow.

**Office of Academic Advising
Merit Increase Criteria**

1. PRIMARY JOB RESPONSIBILITIES

- a. Manages operational, program, or committee responsibilities with the ability to prioritize and organize duties accurately and efficiently. Consistently meets deadlines, develops short and long term goals, develops appropriate solutions, consults with colleagues/supervisors as needed and makes decisions in a timely manner.
- b. Maintains up-to-date and accurate knowledge of campus resources, partner offices and departments to provide appropriate referrals and maintain positive and collaborative working relationships.
- c. Actively participates in development and enrichment of office goals and objectives via constructive communication with colleagues and supervisors. Contributes feedback and/or ideas in group discussions. Responds to feedback positively and constructively.
- d. Conducts self in a professional, positive, supportive and respectful manner. Exhibits sensitivity and adaptability to different personalities, work styles and cultures.

2. COMMITMENT TO THE UNIVERSITY

- a. Seeks opportunities to expand knowledge of and participation in the broader university. Attends and/or participates in university events, programs, and/or committees.

3. PROFESSIONAL DEVELOPMENT

- a. Seeks opportunities to grow professionally by identifying workshops, classes, literature, research publications and/or groups both inside and outside the institution. Attends and/or participates in these learning opportunities around academic advising or other communities of practice. Shares information learned with OAA colleagues via such means as staff meetings, reports, or presentations.

EXCEEDS EXPECTATIONS would result in an Officer of Administration going above and beyond meeting minimum expectations. This could include demonstrated initiative, creativity, research and problem-solving, assuming additional duties or leadership roles, holding elected office, appointment to committees, publications, presentations or awards, going above and beyond customer service expectations, and any other exceptional contributions to the office goals and objectives, mission, and/or broader service to the university.

Accessible Education Center Merit Increase Criteria

Merit criteria in four areas will be used to distinguish performance:

0- Unsatisfactory

Performance fails to meet job requirements on a consistent basis.

1- Fully satisfactory

Performance fully meets job requirements on a consistent basis.

2- Very good performance

Performance frequently exceeds requirements, demonstrating initiative and producing at a very high quality level.

3- Unusually good performance

Performance consistently exceeds requirements, with minimum supervision and/or direction. Achievements are well beyond those expected at this level; production at a superior quality level.

PERFORMANCE RELATED TO CORE SERVICE OR ADMINISTRATIVE ACTIVITIES

Effectiveness in carrying out the responsibilities inherent in the position (ability to analyze and plan work). Effectiveness in performing responsibilities generally to promote the welfare and central purposes of the department and University.

DISABILITY SERVICES/ ACCESSIBLE EDUCATION SPECIFIC FUNCTIONS

Versatility to work with a variety of student issues and range of disabilities; Level of understanding of the range of accommodation needs, legal implications, universal/inclusive design principles; Knowledge of general education, basic academic deadlines, and other academic requirements; Specialized expertise in a particular area/program or type of disability.

PROFESSIONAL DEVELOPMENT AND RELATED CONTRIBUTIONS

Engagement with professional development opportunities, ie. conference/trainings, presentations, holding office, serving on committees. Demonstrated concern regarding professional growth opportunities for other staff. Awareness of current developments in profession. Demonstration of capacity to learn from experiences and adapt to changing circumstances.

**LEADERSHIP IN SERVICE AND ACTIVITIES ON BEHALF OF THE LARGER
COMMUNITY**

Participation in departmental or University initiatives, committees or activities; relevant community involvement and engagement.

First-Year Programs Merit Increase Criteria

The following criteria are the basis for evaluating the core performance of professional duties and for the corresponding recommendations for merit increases.

Communication

3 – unusually good performance. Excellent written and presentation skills. Clear communication verbally and in writing. Experienced and able to speak effectively and comfortably in both small and large group settings. Able to communicate well with all FYP team members. No oversight necessary.

2 – very good performance. Strong written and presentation skills. Able to perform very well independently and without continuous oversight. Engages fully in communication within the FYP team; gives accurate, error-free information to campus and community members. Occasional guidance needed.

1 – fully satisfactory performance. Writes and speaks accurately. Able to give good information about the programs, but not yet fully practiced or comfortable speaking to groups. Participates in discussions in FYP but does not take a leadership role. Writing and presentations require minimal oversight.

0 – unsatisfactory performance. Not a strong writer or public speaker. Does not participate fully in FYP team discussions. Cannot be relied on to give accurate information about FYP programs or information about the UO in general to campus and community members. All communication requires close supervision.

Initiative

3 – unusually good performance. Introduces significant ways to move the work of the unit forward. Follows through on initiatives and engages the FYP team fully in any processes of change. Can evaluate effectiveness of work procedures and suggest alternative approaches.

2 – very good performance. Suggests and initiates effective approaches to the work of the unit. Works with the team and the director to help bring about changes, and is able to advocate for his/her ideas.

1 – fully satisfactory performance. Recognizes the need for new approaches and is flexible and willing to try new methods and processes. Seeks ways to improve primarily his/her own work. May also suggest initiatives that could affect the work of the entire team.

0 – unsatisfactory performance. Reluctant to change approaches or methods of work. Does not identify need for updating and improving one's own work or that of the unit.

Leadership

3 – unusually good performance. Helps to formulate/evaluate the priorities of the unit and to advance them. Can represent First-Year Programs with authority to the campus and external communities. Provides guidance to members of the FYP team. Assumes leadership roles outside of the unit and division by serving on campus committees, etc. Engaged in the larger issues of the campus.

2 – very good performance. Contributes to the smooth functioning of FYP by taking on exceptional tasks for the benefit of the unit. Understands the requirements of the work and actively furthers them. Represents the work of FYP in groups or committees with campus partners.

1 – fully satisfactory performance. Entirely responsible for his/her own work, but also may support other members of the team for the good of the unit. Able to make reasoned responses to the changing requirements of the work. Demonstrates problem solving skills.

0 – unsatisfactory performance. May follow instructions, but rarely takes over full responsibility for a project. Is not a self-starter. Does not step in to help others on the team without a request.

Professional Development

3 – unusually good performance. Sets goals for his/her own performance and for the improvement of the work of the unit; strives to realize those goals. Actively seeks out opportunities to improve skills and gain knowledge by taking classes and participating in TEP and HR workshops, etc. May attend conferences, give talks, lead sessions.

2 – very good performance. Sets goals for his/her own performance and for the improvement of the work in the unit and strives to realize those goals. Participates in workshops, classes, etc. to improve skills and gain knowledge.

1 – fully satisfactory performance. Sets goals for his/her own performance and strives to realize those goals. Participates in university-wide service and learning opportunities.

0 – unsatisfactory performance. Does not strive to improve skills; does not follow up on suggestions to do so.

University Teaching and Learning Center Merit Increase Criteria and Policy on Employee Evaluations

The Teaching and Learning Center (TLC) hires both Non-Tenure Track Faculty (NTTF) and Officers of Administration (OAs). NTTF, also referred to as Career Instructors, are members of United Academics, while Officers of Administration (OAs) are not part of a bargaining unit.

Despite this distinction, TLC strives to achieve a unified community by maintaining policies and practices that are consistent for all employees, regardless of job descriptions and classifications. Toward that end, all TLC employees are encouraged to participate in the development of TLC's governing policies, especially as they relate to committees, curricular standards, professional expectations, and performance evaluations.

TLC Employee Classifications

Non-Tenured Teaching Faculty (NTTF)

Employees with NTTF contracts generally have teaching assignments among their primary responsibilities. However, employees with teaching responsibilities who also have supervisory responsibilities are issued OA contracts.

Officers of Administration (OAs)

Employees with OA contracts have job assignments that may differ significantly from one another. For example, responsibilities for OAs range from teaching classes to consulting with faculty; from advising students to supervising tutors; and from directing programs to managing office operations.

Performance Evaluations

TLC employees' performance evaluations typically take place on an annual basis. The exact nature of the process may differ from year to year and from program to program; however, the guidelines for conducting performance evaluations for TLC employees comply with the [2013-15 Collective Bargaining Agreement between the University and United Academics](#) (Article 19; Section 3 and 4).

TLC employees and their supervisors are encouraged to determine the type of evaluation that works best for their purposes. In doing so, they may want to refer to the *Performance Criteria for Merit Raises* (see below) for possible criteria to include when generating assessments.

Often performance evaluations begin with self-reflective assessments that form the basis for discussions between the employees and their supervisors. Following these discussions, the supervisors write evaluative summaries, which along with the employees' self-assessments are submitted to the Director of TLC. Employees have the right to respond in writing to anything included in their supervisors' evaluations.

The Human Resources' website offers a variety of options for approaching performance evaluations, including *Structured, Narrative, Conversation, Goals and Result, Self-Assessment* and *Third Party Input*. Their site also provides links to evaluation forms.

Merit Raises

To be eligible for increases in salary based on merit, TLC employees must meet or exceed performance expectations. When UO offers merit raises, they are awarded to TLC employees based on their annual performance evaluations or based on separate reviews enacted for the specific purpose of determining raises based on the quality of job performance.

Performance Criteria for Merit Raises

The criteria for meritorious performance comprises four categories. Listed under the general categories are qualities and aspirational behaviors that may be useful in defining exceptional professional performance. These specific suggestions are not meant to limit the multiple expressions of meritorious effort, but rather to illustrate attributes employees bring to their work that are worthy of such recognition.

1. Primary Responsibilities

Fulfills work obligations in a manner consistent with the values and mission of TLC; assumes personal responsibility for the quality of professional work; embraces challenges and unexpected opportunities; responds positively and constructively to feedback.

2. Intellectual Enrichment

When teaching, advising, consulting, or administering, demonstrates ability to engage students, faculty, or staff in critical thinking, problem solving, creative expression, decision making, or other activities that serve to enrich their academic or professional lives.

(A variety of items often included in teaching portfolios may be helpful in assessing teaching, including syllabi, sample assignments, grading rubrics, and teaching philosophies. Student evaluations, classroom observations, and student feedback may also support teaching excellence.)

3. Professional Responsiveness and Growth

Shows initiative, persistence, and creativity; builds collegial partnerships that further TLC or institutional initiatives; welcomes opportunities for professional growth.

4. Community Engagement

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Participates in programs, collaborations, or partnerships that enrich UO's teaching and learning culture; engages in activities that contribute to a community that values equity, inclusion, and the diversity of identities, perspective and thought.