Conducting Staff Merit Conversations
A Guide for Supervisors

This tool is designed to help supervisors prepare for merit conversations, communicate merit information effectively, and manage questions.

Merit Conversations are Important because they...
- Reinforce Northwestern’s mission to reward staff performance.
- Add transparency to Performance Excellence and the Annual Salary Planning process.
- Lead to increased staff engagement.

When Should You Have the Conversation?
The merit conversation is the next important step in the overall performance review cycle and should take place by Friday, August 24. Keep in mind staff will have the ability to see the system-generated merit letter within myHR on August 26 so it is important to have the conversation prior. Other key dates are listed below:

<table>
<thead>
<tr>
<th>What</th>
<th>When</th>
<th>For whom</th>
</tr>
</thead>
<tbody>
<tr>
<td>System-generated merit letters are available under the “Pay” tile in myHR</td>
<td>August 26</td>
<td>Biweekly Staff, Monthly Staff and Librarians</td>
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<tr>
<td>FY19 salaries are effective</td>
<td>August 26</td>
<td>Biweekly Staff</td>
</tr>
<tr>
<td></td>
<td>September 1</td>
<td>Monthly Staff</td>
</tr>
<tr>
<td>Pay reflects FY19 salaries</td>
<td>September 14</td>
<td>Biweekly Staff</td>
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<td></td>
<td>September 30</td>
<td>Monthly Staff</td>
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Prepare for the Conversation

1. Review all merit decisions
   - In preparation for the meeting, meet with your supervisor to understand the factors and validate all decisions that went into merit.

2. Rehearse
   - Rehearse what you’re going to say, choosing the easiest and clearest way of explaining the factors that went into how pay decisions were made in your school or unit.
— For example, some schools/units conduct calibration sessions. Calibration sessions provide an opportunity for leaders to discuss the individual performance of team members with the goal of ensuring the department staff are evaluated using a consistent application and understanding of the ratings, no matter who they report to.
— Other examples of decision-making factors are staff performance, position within pay range, job proficiency, and critical skills.

Anticipate reactions

- Anticipate how each staff member may react and prepare for responses that address those anticipated questions.

2 Conduct the Conversation

Tie Performance and Pay

- Lead with a reference to or summary of the staff member’s performance and rating as discussed in the Performance Conversation.
- Recognize that schools/units adhere to an overall merit budget and share the staff member’s merit in relationship to the budget.
- Some staff members may ask about how they can increase their pay in the future. In these cases, provide guidance and suggestions for how your staff member can add value through higher levels of performance.

Take Ownership

- Take ownership of all pay decisions that affect your staff member.
- Make sure you understand the factors that led to the merit decision and reinforce them throughout the conversation.
- If a staff member voices dissatisfaction with pay decisions, acknowledge what they have said by listening to their feedback and reiterating how decisions were made.

Explain Next Steps

- Give the staff member the opportunity to ask questions.
- Communicate the applicable effective date and when the merit will be reflected in their paycheck (see table on page 1).
- Remind them their system-generated letter is available on myHR under the “Pay” tile beginning on August 26.