IANR Annual Merit Recommendation Form (Merit Form)

Date Completed: ____________________________

Supervisor Name: ____________________________  Department: ____________________________

NOTE: Rows can be added or removed in each section depending on the number of employees supervised. It is possible there will not be any employees listed in every section. This information will be shared with unit administrators to make salary determinations.

List the name(s) of the employee(s) and justification(s) for **exceptional performance** rating.

<table>
<thead>
<tr>
<th>EXCEPTINAL PERFORMANCE</th>
<th>Employee Name(s)</th>
<th>Justification(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
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</tbody>
</table>

List the name(s) of the employee(s) for each of the following ratings. No additional justification is needed on this form for employees in these areas.

<table>
<thead>
<tr>
<th>SOMEWHAT MEETS/DOES NOT MEET</th>
<th>FULFILLED EXPECTATIONS</th>
<th>CONSISTENTLY EXCEEDED EXPECTATIONS</th>
<th>Employee Name(s)</th>
<th>Employee Name(s)</th>
<th>Employee Name(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Performance did not consistently meet job requirements</td>
<td>Performance consistently met expectations in key areas of responsibility; at times may exceed expectations. Overall quality of work was good</td>
<td>Performance consistently exceeded expectations in key areas of responsibility, and the quality of work was generally excellent</td>
<td></td>
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</tr>
<tr>
<td>Met majority but not all expectations</td>
<td>Dependable, highly reliable, follows through on assignments</td>
<td>Exhibited model behavior that reflected the values of the organization</td>
<td></td>
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<tr>
<td>Behavior may not consistently reflect the essential organizational values</td>
<td>Exhibited behavior consistent with the values of the organization</td>
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<tr>
<td>This performance rating would typically follow on-going counseling and coaching for improvement</td>
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</tbody>
</table>

List the name(s) of the employee(s) and justification(s) for **did not meet expectations** rating. This rating should not be a surprise to the employee. You should have/maintain adequate documentation to support/show meetings and notification to the employee about expectations not being met. For each employee listed, please note whether you have contacted IANR HR to assist you with addressing the employee’s performance concerns.

<table>
<thead>
<tr>
<th>DID NOT MEET EXPECTATIONS</th>
<th>Employee Name(s)</th>
<th>Justification(s)</th>
<th>IANR HR (Y/N)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Failed to meet essential performance expectations</td>
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<tr>
<td>Lack of improvement would likely be previously documented through progressive discipline</td>
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<td></td>
<td></td>
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<tr>
<td>Behavior may be contrary to essential organizational values</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Repeated overall annual ratings of “Did Not Meet and Somewhat Meets/Does Not Meet” should not be tolerated. Improvement is essential for continued employment. A plan to improve performance must follow and include clear expectations, deadlines, and formally scheduled one-on-one reviews for measuring the expected improvements.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
IANR Annual Merit Recommendation Form Instructions

The IANR Annual Merit Recommendation Form (Merit Form) bridges the staff performance management process to the annual merit increase process.

Keep in mind that this is a recommendation. The final merit increase decision is made by the Unit Administrator.

Steps for Supervisors

1. Distribute Merit Form
   - The merit form will be sent to supervisors by their Business Centers by March 1 each year.

2. Complete Merit Form
   - One form should be completed per supervisor.
   - 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.
   - All regular staff employees supervised should be listed on the form in one of the five areas:
     - Exceptional Performance
     - Consistently Exceeded Expectations
     - Fulfilled Expectations
     - Somewhat Meets/Does Not Meet Expectations
     - Did Not Meet Expectations

3. Return Merit Form
   - Return the form as soon as completed, but no later than March 31.
   - Supporting documentation does not need to be attached, unless required by the Unit Administrator

4. Conduct Merit Conversation
   - Your Business Center will provide you with the final merit increase information.
   - Schedule a time to meet with your employees individually to let them know what their salary will be as of July 1.

Questions related to performance management and the merit form should be directed to:
   - Marci Sturek, IANR HR
     msturek2@unl.edu
     (402) 327-1842

Questions related to merit amounts and the merit process should be directed to your Business Manager or the IANR Budget Office.
   - Bryan Areman, IANR Finance Director
     bareman2@unl.edu
     (402) 472-1420