



UNION OF RUTGERS ADMINISTRATORS
LOCAL 1766, AFL-CIO
AMERICAN FEDERATION OF TEACHERS

UNDERSTANDING STAFF COMPENSATION PROGRAM (SCP)

Performance Evaluation

FY 2023



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Staff Compensation Program (SCP) is the annual performance evaluation process only for URA.

- The only evaluation for our unit.
- Not part of a disciplinary process.
- Covers May 1, 2022 – April 30, 2023.



SCP Timeline

- Should be completed every year by **April 30**.
- Supervisors must notify employees of performance evaluation ratings by **May 15**.
- Employee may comment in writing by **June 1**, with comments attached to the appraisal.
- The employee may **appeal within 30 days** of receipt of the evaluation, under certain circumstances.
- If overall rating is Does Not Meet Standards, a re-evaluation is required by **October 15**.



Evaluation Results Do NOT Affect Your Pay

- Old “merit pay” systems were not effective for management or union employees.
- Your evaluation is part of your personnel record, kept at the unit level.
- It’s the only place your job description is likely to get updated.



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Why Self-Appraisals are Important

- Remind your manager of your accomplishments, development, and challenges.
- Helps your manager understand what you see as your strengths and weaknesses.
- Self-appraisals are a crucial component to providing a “complete picture” of performance.
- It can protect you. It documents what your duties are and that you perform them well.
- You will use this if you seek acting pay, reclass or in-grade.



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Advocate for Yourself

- Just because you do excellent work doesn't mean people will magically know about it.
- Celebrate and recognize your contributions – big and little. It's not arrogance. It's okay to feel good and feel proud.
- Put your under-the-radar contributions on the radar. If it's not written down, it didn't happen.



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Prepare Your Self-Appraisal

Think about the **percentages of your time**. Did they change? **Remember, you were already at 100%**

- Note new tasks and additional responsibilities, including out-of-title duties.
- Note INCREASED workload. Your performance evaluation may be the only place it will be noted.
- Include challenges you faced with technology, communications, and access to other resources.



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Challenges

- Talk about challenges. They are an opportunity to change and improve your situation and possibly the system.
- Framing problems as system problems can help supervisors explain things up the chain.
- Identify professional development opportunities that can help hone your skills and expand your knowledge.



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Play Smart Defense

- If something went wrong, were there mitigating factors?
- What is within your control and what is not?
- Did you notice the problem? Bring it to management's attention? Suggest remedies? Take corrective action?
- Did your department "pivot" from one priority to another? And then back?
- Did your technology change?
- Do you have a plan to correct your own shortcomings? Even better, have you started it already?



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Performance Appraisal Action Verbs

Focus on the verbs, not the adjectives.

Accounts	Collaborates	Designs	Organizes	Promotes
Acquires	Computes	Drives	Oversees	Reconciles
Adapts	Condenses	Elaborates	Plans	Reports
Adjusts	Confers	Elects	Posts	Resolves
Administers	Confirms	Eliminates	Predicts	Solicits
Adopts	Consolidates	Employs	Prescribes	Solves
Advises	Constructs	Encourages	Presents	Supports
Advocates	Consults	Endorses	Preserves	Streamlines
Allocates	Controls	Enhances	Prevents	Trains
Allots	Converts	Establishes	Prioritizes	Updates
Analyzes	Conveys	Explores	Procures	Utilizes
Articulates		Evaluates	Produces	Verifies
			Programs	



Section 1: Appraisal Matrix

1. List the three to five **Key Duties** (use a word or short phrase to describe the duty) of the position.
2. Indicate the **priority percentage** for each duty (should total 100%).
3. **Appraise** each duty in Sections 3 & 4 (the following page), then transcribe the rating to the column below.

<u>Key Duties</u>	<u>Priority</u>	<u>Rating</u>
1.	50%	Meets Standards
2.	40%	Meets Standards
3.	10%	Meets Standards



SECTION 2: OVERALL ASSESSMENT

Based upon the appraisal rating for each key duty and its priority level, indicate the employee's overall appraisal rating which reflects his or her performance during the past year by checking one of the categories below. Use the following rating scale and **provide comments to explain your rating.**

(Check only one.)

- Meets Standards.** This rating encompasses a wide range of performance from employees satisfactorily meeting job expectations to making exceptional contributions in advancing the objectives of their departments and/or the university.
- Does Not Meet Standards.** Employees who do not satisfactorily meet job expectations and **overall** do not consistently perform their assigned responsibilities adequately will be given this rating. Employees who receive this rating will be provided specific guidelines on how to improve performance and will be reevaluated again by October 15 of this year.

Note: Performance in the higher priority duties should have a greater impact on the overall assessment than performance in the lower priority areas.

Comments (add pages as necessary):



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Employee Name:

Key Duty # 1: Key duty from Section 1 Appraisal Matrix xx%

Note: Please copy this page for each Key Duty and attach additional pages to the form as necessary.

SECTION 3: PERFORMANCE STANDARDS

For each key duty, describe the performance expectations for the **Meets Standards** level of performance for the current evaluation process.

- Check here and detail on an attached page if standards are being modified for next year's evaluation process.**
- Meets Standards**
- Does Not Meet Standards**

This is where performance standards and expectations are supposed to be described but usually is written like a job description.

Highlight your achievements, explain challenges, and set goals for FY24.



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SECTION 4: APPRAISAL & DOCUMENTATION

Appraisal

Check only one rating level to appraise the employee's performance during the past year on the duty described above. Use the explanations for the rating scales described in Section 2.

- Meets Standards
- Does Not Meet Standards

Support for Appraisal

Provide documentation and specific examples of performance or accomplishments to support your rating (attach pages as necessary).

Attach emails, certificates, awards, reports, publications, etc. that highlight and exemplify your excellence.



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SECTION 5: PERFORMANCE IMPROVEMENT OR ENHANCEMENT

To be completed by supervisor based on performance ratings from prior year and performance expectations for upcoming year. **Must be completed and specific guidelines provided on how to improve performance if overall evaluation is "Does Not Meet Standards"**.

SECTION 6: SIGNATURES AND COMMENTS

Overall Appraisal Rating (from Section 2): Meets Standards
 Does Not Meet Standards
(will be re-evaluated by October 15 of this year)

First-Level Supervisor Date

Comments

Second-Level Supervisor Date

Comments



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SECTION 6: SIGNATURES AND COMMENTS (cont.)

Employee

Date

Notes: An employee's signature does not necessarily indicate agreement with this evaluation. An employee may request a review of the evaluation in accordance with Article 38, Section E of the negotiated [URA-AFT Agreement](#) and as explained in the "Review Process If SCP Procedure Is Not Followed" available on UHR's website (<http://uhr.rutgers.edu/>), or by calling University Human Resources at 732-932-3020.



Signing the Evaluation Form

- Sometimes becomes an informal negotiation between the employee and the supervisor.
- **If you do not agree, sign: “Receipt only”.**
- Attach your self-appraisal or comments. These become part of the document.



Copy of Performance Evaluation

- Supervisors are to provide a copy of evaluation to employee **IF** requested by employee.
- Request and keep a copy of the final document with all supervisors' signatures for your records.



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Performance Review Meeting

- Bring a copy of your self-appraisal to use as a reference.
- Standards for the next year are set in this evaluation process.
- Standards should be a discussion with mutual agreement.
- The box in Section 3 should be checked if standards are being modified with details attached.



“DOES NOT MEET STANDARDS”

- A “Does Not Meet Standards” rating in one of the key duties does not mean your job is in danger if you meet standards overall.
- Not grounds for termination (most “Meet Standards” the next year).
- Employees who receive this overall rating will be provided specific guidelines on how to improve performance.
- Employees will be re-evaluated by October 15 of that year.



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Appeal Process only if:

- SCP procedures were not followed
- Demonstrable factual inconsistency in the evaluation.
- Not evaluated according to the performance standards for their job

The judgment that forms the basis of the “does not meet standards” rating shall be at the sole and exclusive discretion of the University and not subject to the appeal process.

The employee may initiate a review within 30 days of receipt of salary notification.

No money involved; strictly for setting the record straight.



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Evaluation vs. CARF

- **If your supervisor accepts that you are doing these duties, the evaluation form becomes part of the documentation for your case for acting pay, reclassification (department or self) or in-range/grade adjustments.**
- Evaluation serves as the job description but may not match Classification and Recruitment Form (CARF).
- SCP job description does not change the CARF.



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Hype doc

You aren't going to remember details from a month or a year ago. Keep a simple, easy to edit "hype" doc.

- Notes/log of meetings or conversations
- Training others
- Keep emails
 - recognition of excellent work
 - requests for clarification
- Professional development classes
- University service, volunteering

Mark the moments you're proud of, and track your growth over time.



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Additional Contract Articles

- Article 41 - Salary Improvements, SCP Procedure, Salary Increases per FY
- Article 39 – Salary Adjustments, Promotion, Reclassification, In-Range/Grade Adjustments, Downgrades
- Article 35 – Reclassification, Self-Initiated Reviews
- Article 2 – Acting Appointment
- Article 39 – In-grade Increases



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Resources

URA-AFT Collective Bargaining Agreement

<http://www.ura-aft.org/contracts2018/>

UHR SCP Information for Deans and Managers

<https://uhr.rutgers.edu/performance-management-staff-compensation-program>

<https://uhr.rutgers.edu/docs/setting-and-communicating-performance-standards>

UHR SCP Overview for Staff (useless)

<https://uhr.rutgers.edu/performance-management-compensation-program-ura-aft>

SCP Review Form if Procedures Are Not Followed:

<https://uhr.rutgers.edu/docs/ura-scp-review-request-form>



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