



2024 PERFORMANCE-BASED MERIT PROGRAM FOR MANAGEMENT & PROFESSIONAL, NON-UNION TECHNICIANS, EXECUTIVE ADMINISTRATIVE STAFF & FARM WORKERS

FREQUENTLY ASKED QUESTIONS

For HR Administrators

The 2024 merit increase scale is 0 – 3%

Excluded Management and Professional (XMP) staff, Service Unit Directors (SUD), and Associate Vice Presidents (AVP) will be eligible for the Performance Based Increase (PBI) under a separate process. Contact Melanie Shek at melanie.shek@ubc.ca if you have questions pertaining to PBI.

As this is the pilot year of utilizing Workday's merit functionality, newer versions of the 2024 FAQs may be uploaded throughout the process to reflect common questions as they arise. For ease of reference, questions related to the Workday functionality are located at the end of this document.

Q: Can I give all of my staff the maximum?

A: It is important to base ratings on meritorious performance. It will be very rare that all staff in a department meet the standard of “extraordinary performance” required to receive a merit increase of 3%. Our Merit program is strictly for the purpose of identifying and rewarding meritorious performance.

Q: Why 0-3%? What if I have the budget to exceed the top rating of 3%?

A: In order to ensure that all employees are treated as equitably as possible regardless of where they work, managers cannot exceed the 3% rating.

Q: Why is there a target average of 1.5%?

A: Rating differentiation is an important concept in the Merit program. A typical team will have a mix of members who perform at the job requirements, as well as those who exceed. The target average of 1.5% is intended to reflect this mix of staff performance within and across teams. Keep in mind that any team average greater than 0% means that you have a team who performs beyond their job requirements.

Q: Our department's operating budget is very tight this year, can we forego awarding merit and look into implementing merit next year?

A: The merit process is a requirement and not a matter of optional participation for faculties/departments. The University is committed to the program, and the University's ability to retain and recruit outstanding staff requires that faculties/departments undertake the program with consistent commitment.

Q: What about staff who are already at the maximum of their range? Can I award a salary increase?

A: All staff who meet the eligibility criteria and who demonstrate meritorious performance are eligible for merit. However, if the employee's salary is already at or beyond the maximum, you will not be able to provide an ongoing increase to base salary. Rather, you can use other methods such as a one-time in-lieu payment to provide merit to these employees.



Q: If I choose an option other than a base salary increase, how do I track these costs? Do I need to report them to HR?

A: The faculty/department can record honoraria directly in the Workday fillable report/grid (please coordinate any merit entries with your department's designated "Merit Planner"). If the in-lieu payment chosen is not honoraria, please contact the central Compensation team so that the university-wide report for Deans and the Executive can be updated. Regardless of the form of payment, merit awards must still fall within 0-3% of salary.

Q: Is the merit increase applicable to other types of salaries (e.g., Administrative Stipends, Pension Top-ups, etc.)?

A: The merit increase is only applicable on the base salary (i.e., regular salary).

Q: I have employees who have joint appointments with another department, how do I ensure there is consistency in merit ratings?

A: If your employees have dual reporting relationships, consultation across departments is important in order to ensure that there is a common understanding of performance criteria, and that a consistent framework is used to evaluate performance.

Q: Once the performance evaluations are completed, where are the forms stored?

A: The completed performance evaluation forms are to be stored in your own department.

Q: Now that we have implemented Workday, I would like to enter the merit information directly into Workday. Can I?

A: Yes, the new Workday Merit functionality is being used starting this year. It is important to enter this via your department's fillable report/grid (please coordinate any merit entries with your department's designated "Merit Planner"). Training/orientation about how to do this is being provided to those in the "Merit Planner" and "Merit Approver" roles – typically senior HR staff/Administrators.

Q: Based on the language of the AAPS LOA #1, if my employee received their probationary increase and is at midpoint of their pay range on August 1, 2023, will they be eligible for the 2024 Merit Program, and what will be the effective date?

A: If your employee received their probationary increase on August 1, 2023, based on the language of the AAPS LOA #1, the employee will be assessed for merit eligibility with an effective date of August 1, 2024. In subsequent years, they will be considered eligible with an effective date of July 2.

Q: Based on the language of the AAPS LOA #1, if my employee received their probationary increase on February 1, 2023 and is at midpoint of their pay range, will they be eligible for the 2024 Merit Program, and what will be the effective date?

A: If your employee received their probationary increase on February 1, 2023, based on the language in the AAPS LOA #1, they will be assessed for eligibility for merit during the July 2024 process. If they are deemed eligible, their merit will be made retroactive to February 1, 2024. In subsequent years, they will be considered eligible with an effective date of July 2.

Q: My staff member was transferred into their current role at the midpoint of their pay range on August 1, 2023 and their probationary period has been waived. Are they eligible for the 2024 Merit?



A: If your staff member is in an AAPS position and the probationary period has been waived, they are eligible for a merit increase with an effective date of August 1, 2024. In subsequent years, they will be considered eligible and receive their merit increase with an effective date of July 2. Note that this applies to AAPS members only, and if your staff member is in the Non-Union Technician/Research Assistant, Executive Administrative Staff, or Farm Worker employment group, then they are not eligible for merit.

Q: My AAPS employee started on October 1, 2022 at the midpoint of their salary range and their probationary period was shorted by 6 months. Therefore, they were off probation on April 1, 2023. Are they eligible for the 2024 Merit?

A: If your AAPS employee was off probation as of April 1, 2023, based on the language of the AAPS LOA #1, they would be assessed for eligibility for merit during the July 2024 merit process. If they are deemed eligible, their merit will be made retroactive to April 1, 2024. In subsequent years, they will be considered eligible and receive their merit increase with an effective date of July 2.

Q: My staff member has been on leave since December 1, 2023. Are they eligible for the 2024 Merit?

A: The Performance based Merit Pay Program is to award staff members for meritorious performance. Therefore, a staff member must have worked at least 8 of the 12 months of the evaluation period in order to be eligible for merit. Since the staff member went on leave on Dec 1, 2023, they've only worked 5 of the 12 months between July 1, 2023 and June 30, 2024. The staff member is not eligible for 2024 Merit.

Questions related to the Workday process

Q: Is the "Merit Planner" security role different from the "Merit Approver" security role? What is functionality of each role?

A: Yes. The Merit Planner role is typically assigned to the senior HR leader/Administrator that will be coordinating the faculty/department's annual merit process. They will communicate with line managers and enter ratings. The "Merit Approver" role undertakes a final review of the faculty/department's merit ratings and provides final approval. The same person can have both security roles.

Q: If the merit process is being done in the Dean's office, will the unit's direct managers not receive the compensation review unless we assign them as Merit Approver?

A: No, the direct managers don't need to be a Merit Approver, and they won't receive a direct Workday inbox task. There are two approaches to merit coordination that the faculty/department can take, and Option #2 below is the approach that involves the unit's direct managers inputting proposed/draft merit ratings for their employees directly into Workday:

Option #1: The Merit Planner coordinates the merit process within the faculty/department, and once the departmental rating/calibration process is complete, they enter all ratings into Workday. The ratings remain "proposed/draft" until final Dean/Executive approval is received.

Option #2 [recommended]:

The Merit Planner coordinates the merit process within the faculty/department, and once they have reviewed the list of eligible employees to ensure accuracy, they send instructions to the relevant direct managers, asking them to go into Workday (via a specific report) and enter proposed merit ratings for eligible staff in their SupOrg (they'll



only see staff in their own SupOrg). The ratings remain “proposed/draft” until final Dean/Executive approval is received

Q: Will managers get any alert when the merit process is launched?

A: No. The Merit Planners can review the list first, and alert managers later if this is the option that they choose.

Q: Can both the Merit Planner and Merit Approver make changes to the merit % entered?

A: Yes, both will have access to add merit ratings to the editable report/“grid” in Workday. The two security roles perform different functions that are “active” at different points of the process. The intention is that the Merit Planner enters or edits the proposed merit ratings during the planning phase. The Merit Approver reviews and confirms the accuracy of the department’s merit ratings after university-wide approval has been provided.

Q: Can you have multiple Merit Planners for one SupOrg?

A: Yes. It’s up to the faculty/department how many Merit Planners you would like in the SupOrg. If there are multiple Merit Planners, then it’s important to coordinate the role of each so that you’re clear as to what each Merit Planner’s role is, as well as the timelines for each task/step.

Q: Can departments add or remove employees from the list of eligible employees showing up in Workday? Can departments change the effective date of the merit payment?

A: No, departments can’t make these changes directly in Workday. Once you can access your list in Workday, please review it for accuracy. If there are any issues with who is on the list, or their eligibility date, please contact your Compensation Consultant/Associate.

Q: Will departments have the ability to move employees to a different manager's list?

A: No. Lists are established based on the SupOrg that has been set up in Workday.

Q: If an AAPS employee is in their first year of eligibility for merit, what will Workday show as the effective date of their merit?

A: The eligibility rules in Workday will identify those employees that are in their first year of merit eligibility, and will show the correct eligibility date (i.e., their anniversary date), and not the general effective date of July 2nd.

Q: When do we enter merit for staff with effective date after July 1 (e.g., dates in October)? And how are those amounts incorporated into the 1.5% target average requirement?

A: If you’re in a position where you can, you should enter merit ratings for staff with effective dates after July 2 at the same time that you enter other merit ratings. This will depend on whether you have enough information about the employee’s performance to make a merit rating determination. These merit ratings will be included as part of the overall merit average rating for the faculty/department. If you’re *not* in a position to make the merit rating determination during the open merit window in Workday, then you can make the merit rating closer to the actual effective date, and process the transaction in Workday locally, outside of the organization-wide merit program.

Q: Does Workday have an alert for when the average merit entered for the unit goes above the targeted 1.5% average?



A: No. The target average of 1.5% is managed differently by different faculties/VP portfolios. As such, this statistic is not included for units in the Workday merit configuration. However, a report is being developed for Vice Presidents to be able to see the overall merit average for their portfolio.

Q: Will Workday calculate the lump sum dollar amount for employees who are at the maximum of their salary range (like the old spreadsheets used to do)?

A: No. However, we may be able to develop a tool to assist with the calculation. Updates will be provided on this.

Q: Is there a way to run a report in advance of managers viewing their employee list in order to review and flag any issues?

A: Managers won't automatically receive a Workday inbox task asking them to review their list of eligible employees. The Merit Planner will have time once the Merit window opens in Workday to review the list to ensure accuracy. If your faculty/department takes the option of requesting managers to fill in their proposed merit ratings for eligible employees in their SupOrg (i.e., Option #2 above), you can choose *when* to request that they do that. Managers would do that by running a report in Workday that shows their eligible staff, and that allows them to enter proposed ratings. The Merit Planner can provide instruction to managers, and provide them a timeline within which to do that. Note that lists won't be available before merit opens in Workday on July 2nd since multiple compensation implementations are ongoing throughout May and June, and so the data may change before the merit window opens in Workday in July.

Q: Will Merit Planners be able to run a global report of those eligible for Merit in their faculty/department at the end to ensure that the entire portfolio is aligned with the 1.5% average?

A: Report development is in progress.

Q: If merit ratings are only being entered as a lump sum dollar amount, and not a percentage, does that mean that we don't need to include those percentages when calculating the average merit amount?

A: No, merit is inclusive of base pay changes and lump sum payments, and both should be part of the calculation of average merit. There's a field in the Workday merit list/grid that shows the total merit % awarded, including both base pay changes and lump sum payments.

Q: If managers have the ability to make merit recommendations for employees they supervise, will the director of those managers be able to see all the recommendations made to ensure that their unit meets the 1.5% average?

A: Yes – this functionality is still being tested, but the plan is that a director will be able to see all ratings of employees in the levels below them in their SupOrg.

Q: When will the training sessions start, and will they be in person or virtual?

A: Training sessions will be on June 21, July 8, and July 26 via Zoom. Refer to the 2024 Merit Memo for specific times and Zoom links.

Q: What is the final deadline to enter merit ratings?

A: The plan is for Merit to be open in Workday on July 2nd, with a closing date of August 16th.

Q: Is the Executive's approval occurring after the merit rating entry into Workday?



A: Yes. The proposed ratings need to be entered into Workday before the executive reviews them in order to provide final approval. However, this will occur before the Merit Approver hits the final approve/send in Workday. The executive review will likely be in late August.