

**LAPSE OF
TIME**

EBAP/20/69

October 27, 2020

To: Members of the Executive Board

From: The Secretary

Subject: **Assistants to Executive Directors—Proposals for Annual Salary Adjustments and Enhancing Career Development**

Board Action:	Executive Directors' consideration on a lapse of time basis
Deadline to Request a Board Meeting, after which Proposed Decision Deemed Approved:	Friday, October 30, 2020 12:00 (noon)
Proposed Decision:	Pages 11-12
Questions:	Ms. Michaels, SEC (ext. 35451) Mr. Klein, HRD (ext. 36911) Mr. Agbakoba, HRD (ext. 37216)



October 27, 2020

ASSISTANTS TO EXECUTIVE DIRECTORS—PROPOSALS FOR ANNUAL SALARY ADJUSTMENTS AND ENHANCING CAREER DEVELOPMENT

Prepared by SEC, HRD, LEG staff

EXECUTIVE SUMMARY

At its meeting on October 20, 2020, the CAM considered and endorsed measures for recognizing and recording the performance of Assistants to Executive Directors, both through annual salary adjustments and enhancing their career development and mobility within the Fund. These proposals respond in part to reforms adopted in the Comprehensive Compensation and Benefits Review that strengthen the linkage between performance and compensation, and other recent work to clarify and broaden opportunities for career progression within the Fund.

Following the CCBR, the Executive Board needs to adopt new decisions to enable OED Assistants to receive a single annual salary increase. Existing rules provide for separate structural and merit salary adjustments for these personnel. Following changes introduced by the CCBR to replace similar processes for Fund staff with a single annual salary increase on May 1, it is no longer possible to operationalize a separate structural adjustment on May 1 and merit award on July 1 for OED Assistants. The CAM therefore recommends a revised approach for administering these increases effective May 1 2021.

In order to enhance OED Assistants' mobility, the CAM also supports measures for enhancing the career development of OED Assistants within the Fund. These focus on providing opportunities for performance discussions and documentation, training, and simplifying the ability to apply to other vacancy positions in the Fund.

Overall, the CAM considers that the frameworks governing employment of OED Assistants are appropriate and do not require significant amendment. They establish a clear, uniform basis for employment of administrative personnel, with appropriate benchmarks to Fund staff, and recognize that each OED is a legally and functionally separate employer. The recommendations presented in this paper therefore seek to remain close to existing frameworks, and to enable OED Assistants

and their Executive Directors to work together on career development that supports strong performance and teamwork.

ANNUAL COMPENSATION ADJUSTMENTS FOR OED ASSISTANTS

- 1. In the Comprehensive Compensation and Benefits Review (CCBR), completed in December 2019, the Executive Board approved changes to annual salary increases for Fund staff and contractual employees.**¹ This new methodology replaces the previous system in which staff received an annual structural salary increase on May 1 of each year, and a separate merit increase on July 1 of each year. A key objective of this change has been to align the Fund's salary increase mechanism more closely to comparator market practices and provide a more balanced emphasis on both performance and salary placement in the salary grade range. The latter consideration is important to enable clustering of salaries around the grade salary midpoint, and act as a brake on salary growth at the upper end of the range.
- 2. Going forward, all Fund staff and contractual employees employed in staff departments will receive a single annual salary increase based on an indexation formula** (taking into account both any approved structural shift in the staff paylines, and an implied merit component). The single annual salary increase will be distributed to staff members based on a matrix that takes into account a formal performance rating and the staff member's position in the salary grade range.
- 3. Historically, Assistants to Executive Directors have received annual salary increases on a similar basis to Fund staff.**² The Executive Board has previously:
 - (i) Agreed that Assistants to Executive Directors shall be eligible to receive an annual structural salary increase on the same basis as comparable Fund staff on May 1; and
 - (ii) Adopted a defined methodology for calculating an annual merit budget envelope for all OEDs (benchmarked to the average merit salary increase for Fund staff), allocating those

¹ See *Comprehensive Compensation and Benefits Review—Revised Proposed Decision*, EBAP/19/104, Supplement 1 (12/16/2019).

² It is important to note, however, that OED Assistants are not staff. The Executive Board has previously adopted decisions providing that OED Assistants positions should be placed on the staff grade ladder (between grades A4 and A8), and they should receive employment benefits on the same basis as Fund staff. However, there are many points of difference between the staff and OED frameworks: the rules governing the calculation of starting salaries, range of the grade ladder, administration of annual salary increases, promotion eligibility rules, scope for promotion to higher grades, and termination provisions all differ in important ways from the rules for Office Assistants.

resources to the individual OEDs, and administering annual merit increases for OED Assistants on July 1.³

4. The CCBR changes necessitate revision of these earlier decisions due to the cessation of the separate structural and merit increase processes. New decisions are required to govern the annual salary adjustment process for these employees.

METHODOLOGY FOR OED ASSISTANT ANNUAL SALARY ADJUSTMENTS

5. In the post-CCBR environment, Executive Directors should continue to be able to award salary increases based on the performance level of their Assistants in a way that is anchored in the broader Fund compensation environment. Given heavy workload demands on Executive Directors, the salary adjustment process should be easy to understand and to administer. It should also establish robust controls to manage the salary growth, given associated impacts on the standard cost rate for OED administrative (REG3) personnel over time. To this end, the CAM recommends that, effective 2021, each OED would continue to receive an annual individual budget envelope for salary adjustments for their Assistants. The methodology for calculating the individual OED salary adjustment budgets is presented in the following section and illustrated in Box 1 with a working example.

Calculating the Annual Salary Adjustment Envelope for Individual OEDs

6. The individual OED salary adjustment envelope (expressed in dollars) would be calculated as follows:

- (i) **An amount reflecting the application of a comparator market-based salary structure adjustment to the salaries on April 30 of each year of the eligible Assistants in each OED.** The market-based factor would be determined annually by HRD, reflecting any approved changes in the Fund pay line adopted in line with the rules-based methodology for assessment against external indices and comparators. (In 2020, the average market-based salary structure increase for Fund staff was 2.7 percent, benchmarked to developments in Fund external comparator labor indices). This adjustment would be calibrated in the calculation of each OED's "salary increase envelope" to reflect each Assistant's position in the grade salary range, as shown in Box 1. This calibration was previously applied in the allocation of the structural salary increase for Fund staff and OED Assistants; carrying this principle through to the calculation of annual salary increase resources for individual OEDs is fully consistent with past practice; and

³ See *Annual Salary Adjustments for OED Assistants – Proposed New Framework*, EBAM/12/7 (7/12/12), and Correction 1 (7/13/12).

- (ii) **A separate amount reflecting the application of the “average implied merit increase factor,”** calculated by HRD, for the Fund staff performance round to the salaries of the eligible Assistants.⁴

7. Eligible Assistants would be defined as those who have been employed in the Office on regular open-ended status for at least six months as of April 30 and are in active employment status as of May 1. OED Assistants who are employed for fewer than six months in the OED, would only be eligible for a market-based salary structure increase. Thus, the calculation of the award envelope for an OED employing an Assistant in this situation would be adjusted to exclude application of the “implied merit component” to that person, and that Assistant would be eligible to receive a salary increase of an amount up to the market-based adjustment only.

8. This proposed methodology remains very close to that which has governed the administration of salary adjustments for OED Assistants for over the past decade.

Methodologically, the two components are calculated on the same basis as the structural salary adjustments and OED merit budget envelopes for the OED Assistants under the existing rules. Effectively the proposed methodology above harmonizes the timing of these two processes, so that they are timed to occur together on a single date, May 1.

9. Executive Directors would be asked to award salary increases within the individual office envelope between their Assistants employed in their Offices, based on their assessment of their performance. Consistent with past practice, an Executive Director may allocate these resources between the Assistants employed in the Office.⁵ It is proposed that, in line with past practice for making these individual awards, Executive Directors would:

- (i) **Be asked to confirm the application of the market-based adjustment indicated for each Assistant to that employee’s salary** (such confirmation would be understood to confirm the Directors’ view that the Assistant is performing satisfactorily). While there is no entitlement to an automatic salary increase, it is proposed that an Executive Director’s decision to not approve the application to the market-based adjustment should be limited to situations in which the Executive Director has significant concerns about the Assistant’s performance, which should be discussed with the Assistant.
- (ii) **Have discretion** to distribute the “implied merit” budget resources between their Assistants in line with the Directors’ assessment of the Assistants’ performance. As noted above, as with market-based adjustments, there is no automatic entitlement to such awards, but decisions not to allocate any such merit budget resources to an Assistant should be limited to situation where Director considers that an Assistant is not performing at a satisfactory level.

⁴ In 2020, the average staff implied merit increase factor was 0.9 percent.

⁵ The resources provided to an OED for salary awards are held at IMF center, and are not charged to the budgets of the individual OEDs. If a Director elects to allocate less than the full amount of the resources within the “award envelope”, the unallocated amount remains at the center of the Fund administrative budget.

10. In making salary increase decisions, Executive Directors will also need to consider the grade salary ceiling applicable to each Assistant (this information will be provided to the Director). The grade salary ceiling establishes a cap on the amount an employee at that grade level can be paid. However, to maintain incentives for performance, past practice has been to permit limited salary growth above the grade salary ceiling.⁶ In line with past practice, it is proposed that:

- (i) Executive Directors may award OED Assistants the full amount of the indicated market-based salary adjustment to that individual's salary, including those Assistants for whom such an award would raise their adjusted salary above the grade salary ceiling, and/or who are currently paid a salary that exceeds the salary ceiling for their grade;
- (ii) OED Assistants who, as at April 30, are paid a salary that is close to the limit established by the salary ceiling for their grade may be awarded a merit increase that is the greater of either the dollar amount that brings the salary to level of the grade salary ceiling, or one half of the average implied merit increase. Assistants whose salaries as at April 30 are above the limit of the grade salary ceiling shall be eligible to receive a merit increase no greater than one half of the average implied merit increase.

⁶ In a few cases, some long-serving Fund staff, and some OED Assistants, are currently paid at or even above the salary ceiling for their grade (this situation generally arises for very long-serving staff who have attained the highest grade in their career ladder). HRD is currently reviewing options for administering salary increases for salaries positioned at or above the maximum of the salary grade. HRD will introduce options for managing salary increases and awards at salary rage maxima early next year.

Box 1. Illustration of Revised OED Salary Adjustment Envelope and Application

In this illustration, OEDXX employs two Assistants, John (A5) and Jane (A7). John is a relatively new hire; his salary is positioned close to the midpoint of his grade salary range (\$65,000). Jane has worked in OEDXX for several years, and her salary is now positioned toward the top end of her grade salary range (\$95,000).

John and Jane have both been employed as of November 1 of the preceding year and therefore are eligible for both the market-based salary adjustment and implied merit salary increases.

Using 2020 metrics as a reference, the Executive Director for OEDXX will receive an annual salary adjustment envelope comprising both a market-based factor, and a separately calculated “implied merit factor.”

The market-based component will be derived by applying the average market-based adjustment factor (in 2020, 2.7 percent) to the salaries of the two Assistants, but adjusted for their relative positions in their respective grade salary ranges. The calibration factor is intended to manage salary growth in a way that permits clustering around the salary midpoint, reflecting an institutional compensation principle that the growth in the salaries of personnel who are already paid above the market average should be constrained. As a rule of thumb, to achieve the institutional objective of salary clustering around the grade midpoint, the calibration would be roughly as follows:

For personnel whose salaries are positioned in the middle third of the grade salary range (like John, whose salary is at the range midpoint), the average market-based factor will apply (calibration factor of 1). For those whose salaries are positioned in the lowest third, a calibration factor of 1.25 would apply, and for those positioned in the top third, a reduced factor of 0.75 percent would apply.

The market-based salary adjustment envelope for OEDXX will be calculated as:

John A5: \$65,000 x (2.7 percent * 1.0) =	\$1,755
Jane A7: \$95,000 x (2.7percent * 0.75) =	\$1,923

The Executive Director will be asked to confirm whether these adjustments should be applied to each Assistant (the value of the adjustment is fixed, and the Director’s decision is either yes or no). Decisions not to award this factor should be limited to cases where the Director has serious performance concerns. The implied merit factor for the Office will be calculated by applying the implied merit factor approved for staff (in 2020, 0.9 percent) to the sum of John and Jane’s salaries as of April 30:

$$(\$65,000 + \$95,000) = \$160,000 * 0.009 = \$1,400$$

The Executive Director may determine, at his/her discretion, whether and in what proportion to allocate these resources between John and Jane.

PERFORMANCE ASSESSMENT FOR OED ASSISTANTS

11. OED Assistants are the only category of OED personnel for whom there is a defined career ladder (a defined grade progression), consideration of merit based salary increases rather than fixed adjustments, and promotion path.⁷ As noted above, the Fund as an institution is focusing strongly on strengthening performance assessment processes, and anchoring compensation growth for individual employees more strongly in performance.

12. Adopting elements of a performance management framework for OED Assistants would provide a clearer basis for managing their career growth, by clarifying expectations at each grade level. A record of performance assessment would support Executive Directors' decision-making both on annual salary adjustments and readiness for promotion to the next highest grade. Providing a mechanism for documenting achievements and growth over time could also support career mobility of OED Assistants within the Fund, as the current absence of a formal annual performance review impedes consideration of OED Assistants within the internal labor market of the Fund.⁸

13. To this end, Executive Directors may wish to conduct annual performance discussions with their Assistants. These discussions are a valuable opportunity for Executive Directors, as personnel managers, to frame performance objectives and expectations, recognize achievements, discuss training goals and opportunities, identify any concerns, and plan for the year ahead. A simple process and template for managing these discussions with OED Assistants would enable Executive Directors to frame these discussions, and record key understandings. The Fund's new HR system platform, Workday, provides a user-friendly interface that both Executive Directors and OED Assistants could complete in advance of the next annual compensation round. Annex I provides screenshots of staff and manager evaluation forms, that could be adapted for this purpose. Executive Directors will be provided with training on how to use the template in advance of the 2021 annual talent management exercise within the Fund.

14. HRD also provides many additional resources that Executive Directors may wish to use to guide their assessment of their Assistants' performance. HRD has recently revised and updated the descriptions of "job families"; the framework for Fund [Office Assistants](#) is broadly

⁷ OED Advisors receive an annual salary adjustment to ensure their salaries remain pegged to the midpoint of the "shadow grade" to which they are assigned on hire (either A11, A12 or A13 on the basis of prior education and work experience), and they are migrated automatically to the next highest tier on meeting the service requirements. They are not eligible for merit pay. The salaries of Executive Directors and Alternate Executive Directors are adjusted (usually annually) following approval of any structural adjustments by the Board of Governors; The Executive Board has traditionally approved the same salary adjustment factor for Senior Advisors.

⁸ The internal recruitment process for Fund staff requires applicants to submit their two most recent Annual Performance Reviews (APRs). OED Assistants are often unable to complete this step. As discussed further below, the CAM considers it important that OED Assistants have opportunities to build their skills and career growth through voluntary career mobility within the Fund.

applicable to OED Assistants, and provides a benchmark for considering key functions and skills.⁹ In addition, the [Behavioral Competencies Matrix](#), which develops progressively over ascending grades, provides helpful benchmarks for assessing whether performance meets expectations at each grade level. Executive Directors could leverage these resources to support their consideration of annual salary awards and readiness for promotion of their Assistants.

ENHANCING OED ASSISTANTS' CAREER DEVELOPMENT AND MOBILITY

15. The CAM notes that, historically, while OED Assistants have tended to have long careers at the Fund, their career progressions have tended to be restricted to moving up the grade ladder in their OED. Stability in these positions is often very helpful to the OEDs: many Executive Directors rely on the extensive institutional knowledge of their Assistants. The history of recruitment into these positions indicates that they are an attractive destination for experienced Assistants on Fund staff. Nonetheless, given a strengthened focus on the importance of fungibility of employment in other parts of the Fund, OED Assistants should not face unnecessary barriers in building their careers through transfer to other positions in the institution.

16. In addition to performance assessment, the career development and mobility of OED Assistants could be enhanced by providing access to relevant training. OED Assistants are eligible to take training courses available through the IMF training catalog. All Fund staff are encouraged to complete four days of training per year; Executive Directors are encouraged to authorize training requests by their Assistants that will help them build skills relevant both for their work in OEDs and that could support mobility to Fund staff.

17. Career mobility could also be enhanced by enabling OED Assistants to apply for other positions on Fund staff more easily. Historically, OED Assistants have been asked to provide a written confirmation that their Executive Director has been informed of, and has agreed to, the intention to apply for a vacancy on Fund staff. This requirement, which is not imposed on any other category of personnel as a precondition of application, creates a potentially high barrier to exploring other Fund employment opportunities. It is proposed that this requirement be removed, and that OED Assistants be permitted to apply for and be considered for vacancies on Fund staff on the same basis as other internal applicants.

18. The CAM also proposes that the job titles of OED Assistants be aligned more closely with those of Fund staff. Office Assistants employed on Fund staff at grades A4 – A5 are titled “Administrative Assistants”; those employed at grade A6 and above are considered “Senior

⁹ Given the broad relevance of the existing job family for Office Assistants, the CAM does not see a need to develop a separate job family description for OED Assistants. While it notes that OEDs tend to place higher importance on language and interpersonal communications skills than on technical word processing and data management skills, the existing frameworks provide room for Executive Directors to recognize and weight those competencies. The CAM considers the current grade range for OED Assistants, which is pitched one grade higher than the grade ladder for Office Assistants (grades A4 – A8, whereas Office Assistants are graded A3 – A7) remains appropriate.

Administrative Assistants”. Adopting this nomenclature for OED Assistants employed in grades A6 – A8 would better recognize the career progression and seniority path within the existing job ladder.

OTHER FACTORS IMPACTING OED ASSISTANTS’ CAREER MOBILITY TO FUND STAFF

19. In considering and developing the proposals presented above, the CAM also has taken note of other practical issues that have an impact on the transfer of OED Assistants to Fund staff. While no proposals are presented at this time on these issues, the CAM wishes to bring them to Executive Directors’ attention.

20. While the proposals presented above are intended to support the mobility of OED Assistants’ to staff, it is recognized that hiring by staff departments remains subject to the “grade average ceiling.” Under this internal rule, the grades of *all* Office Assistants employed in a department, cannot exceed an average of 5.3, to mitigate the tendency toward grade “creep”. As a result, most Office Assistants on Fund staff are employed at grades A5 and below. The grade ceiling average is not imposed on the OEDs, and a majority of OED Assistants are employed at grades A6 and above (see Table 1 below).

Table 1. Current Distribution of OED Assistants by Grade

Grade	No. of Assistants	Position in Salary Scale Relative to Current Salary			Current Salaries of Assistants						
		Segment 1	Segment 2	Segment 3	Relative to MidPoint Salary	Above MidPoint No.	Above MidPoint %	Relative to Max Salary	Above Max No.	Above Max %	
A04	2	0	2	0	\$ 58,460	2	4%	\$ 70,160	0	0%	
A05	9	0	9	0	\$ 65,470	3	6%	\$ 78,570	0	0%	
A06	10	0	10	0	\$ 73,330	5	10%	\$ 87,990	0	0%	
A07	13	0	7	6	\$ 82,130	12	24%	\$ 98,550	4	8%	
A08	15	0	8	7	\$ 91,990	13	27%	\$ 110,390	4	8%	
Total	49	0	36	13		35	71%		8	16%	

Source: SEC and HRD

21. The CAM notes also that mobility encompasses transfer to staff employment on termination by an Executive Director. OED Assistants who have completed at least six years of service in an OED, or who transferred to an OED from a regular staff position, are entitled to transfer to employment on the Fund staff if their position is terminated by an Executive Director¹⁰. This longstanding right, which is unique to the OED Assistants, is intended to provide a safety net for these positions given the two year Executive Board term, and likelihood that an OED Assistant will

¹⁰ OED Assistants who were regular staff of the Fund prior to joining OED retain their status as staff members and maintain the right of reemployment.

work for many different Executive Directors over the course of a career. In practice this right currently is operationalized by transfer of a terminated Assistant to the SOS “pool” maintained by HRD.¹¹ This is intended as a temporary measure, to provide a platform from which the Assistant may be hired into a staff department. Following their transfer, the Assistants are provided training and given temporary assignments to staff departments.

22. The current operation of this transfer provision raises complex issues:

- **Ongoing institutional costs:** OED Assistants who move to staff through this mechanism tend to remain in the SOS pool for extended periods, rather than quickly bridging to a new career path (this can reflect mismatches between the Assistants’ grade and/or skills with opportunities in staff departments, difficulty in adapting to the staff environment, or ongoing performance issues). Termination of a position from OED transfers personnel cost from OED to HRD, often on an ongoing basis. The administrative cost to HRD of maintaining these positions is high (estimated to be \$0.6 million per annum).¹²
- **Open-ended employment following transfer:** The current rules imply a guarantee of open-ended employment of eligible terminated OED Assistants on Fund staff, including OED Assistants who were not previously employed on Fund staff. HRD is required to maintain these positions indefinitely for transferred Assistants who are unable to find a permanent position in staff departments. Under current staff employment rules, all new hires join the Fund initially on a term appointment. Toward the end of the term appointment, their suitability for open-ended employment is carefully assessed against performance and institutional needs. For institutional alignment, the CAM may wish, in future, to consider harmonizing the rules for new OED Assistants who are hired from outside the Fund with the staff employment rules in case of transfer to staff after termination from an OED. Assistants not previously employed on Fund staff and who are transferred to staff upon termination would then be subjected to the same assessments during the term appointment as newly hired Fund staff.

23. The proposals presented above may help to mitigate these issues. In particular, introduction of tools to enable Executive Directors to conduct regular performance assessments of their Assistants could build a stronger shared understanding of how to best meet and adapt to the administrative needs of the Office over time. The CAM hopes that by building a shared performance-oriented culture in the OEDs, there will be less need for recourse to termination of OED Assistants in the future. While no change to the current job protection provisions for OED Assistants is proposed at this time, future committees may wish to review these issues further, in light of experience with the use of the proposed performance review template.

¹¹ The SOS pool is not a department but a dedicated team of Staff Assistants, mostly contractual employees, who provide temporary secretarial support to departments.

¹² HRD receives budget for three FTEs to accommodate transfers from OED. Currently, however, there are six former OED assistants in SSG.

Proposed Decision

The following decision, which may be adopted by a majority of the votes cast, is proposed for adoption by the Executive Board:

- (i) Effective 2021 on May 1 of each year, eligible Assistants employed on open-ended appointments to Executive Director in an Office of Executive Director, shall be eligible to receive an annual salary increase, to be awarded by his/her Executive Director on the basis of an assessment of performance.
- (ii) For this purpose, Executive Directors will be allocated an individual OED Assistant salary increase envelope, to be calculated as follows:
 - (a) An amount reflecting the application of a market-based salary structure adjustment to the salaries on April 30 of each year of the eligible Assistants in each OED. The market-based factor will be the same as determined annually by HRD for staff, reflecting any approved changes in the Fund pay line adopted in line with the rules-based methodology for assessment against external indices and comparators. This adjustment will be calibrated in the calculation of each OED's "salary increase envelope" to reflect each Assistant's position in the grade salary range; and
 - (b) A separate amount reflecting the application of the "average implied merit increase factor" calculated by HRD for the Fund staff performance round to the salaries of the eligible Assistants employed in each Office.
- (iii) Eligible Assistants are defined as those who have been employed in the Office of Executive Director for at least the preceding six months on April 30 (i.e. from November 1 of the preceding year), on open-ended appointments. Assistants who have been employed in an OED for fewer than six months on open-ended status as of April 30 shall be eligible to receive an increase within the limit established by (ii)(a) above (i.e., market-based salary structure adjustment only).
- (iv) In allocating these resources, the Executive Director shall:

- (a) Be asked to confirm the application of the market-based adjustment indicated for each Assistant to that employee's salary (such confirmation would be understood to confirm the Directors' view that the Assistant is performing satisfactorily). An Executive Director's decision to not approve the application to the market-based adjustment should be limited to situations in which the Executive Director has significant concerns about the Assistant's performance, which should be discussed with the Assistant.
- (b) Have discretion to distribute the "implied merit" budget resources between their Assistants in line with the Directors' assessment of the Assistants' performance. Decisions not to allocate any such merit budget resources to an Assistant should be limited to situations where Directors consider that an Assistant is not performing at a satisfactory level.
- (v) Executive Directors may award OED Assistants the full amount of the indicated market-based salary adjustment to that individual's salary, including those Assistants for whom such an increase will raise the salary above the grade salary ceiling, and those whose salaries as at April 30 exceeds the grade salary ceiling;
- (vi) OED Assistants who, as at April 30, are paid a salary that is close to the limit established by the salary ceiling for their grade are eligible to receive a merit increase that as a maximum is the greater of either the dollar amount that brings the salary to level of the grade salary ceiling, or one half of the implied average merit increase. Assistants whose salaries as at April 30 are above the limit of the grade salary ceiling shall be eligible to receive a merit increase that as a maximum is no greater than one half of the average implied merit increase.

Annex I. Illustration of Workday’s Employee and Manager Performance Evaluation Forms

Step 1: Employee Self Evaluation

Briefly comment on:

- 3 - 5 key achievements during the fiscal year.
- Development interests moving forward.

Objective Setting & Staff Comments

✕ ✎

Objective
Provide sound administrative and logistic support to the division.

Description

Relates To
Events Management (Competency)

Category
Individual Objective

Due Date

Status
In Progress

Add

Summary

Employee Evaluation

Comment *
FY2020 has been a challenging year with the pandemic.

Staff Member: Your review will also include an assessment by your manager on these competencies.

Manager: Assessment should take into consideration the IMF Core Values—*Honesty, Inclusion, Respect, Integrity, Excellence, Impartiality*
Assess staff competencies, considering the complexity, autonomy and magnitude of achievements. This assessment should include both strength and development.

Technical Competencies

Competency
TECHNICAL COMPETENCIES FOR ADMINISTRATIVE SERVICES

Description

- Business Planning Analysis
- Copyediting and Proofreading
- Document Management & Retrieval
- Events Management
- Knowledge of the Fund Operations and Policies.

Staff Member: Your review will also include an assessment by your manager on these competencies.

Manager: Assessment should take into consideration the IMF Core Values—*Honesty, Inclusion, Respect, Integrity, Excellence, Impartiality*
Assess staff competencies, considering the complexity, autonomy and magnitude of achievements. This assessment should include both strength and development.

Behavioral Competencies

Competency
Behavior

Description

- Problem Solving** - Applying Analysis and Expertise; Learning Agility; Initiating Innovation and Change; Strategic Thinking
- Communication** - Structured and Clear Communication; Credible and Persuasive Verbal Presentations; Active Listening; Influencing and Negotiating
- Relationship Management** - Building Collaborative Relationships; Demonstrates Interpersonal Sensitivity; Seeks to Build and Maintain Relationships
- Work Management** - Planning and Organizing; Effective Execution; Adaptability Drive for Results

Staff Member: Your review may also include an assessment by your manager on these competencies.

Manager: Assessment should take into consideration the IMF Core Values—*Honesty, Inclusion, Respect, Integrity, Excellence, Impartiality*
Assess staff competencies, considering the complexity, autonomy and magnitude of achievements. This assessment should include both strength and development.

People Management (for Managers Only)

Competency
People Management

Description

Developing People - Appraises accurately; Engineers opportunities for development; Provides coaching and feedback; Catalyzes IMF core values
Leading and Managing Teams - Demonstrates leadership and motivates teams; Delegates appropriately and fosters teamwork; Role models IMF core values

View only



Step 2: Manager Evaluation

- a. Review/Edit Employee Objectives
- b. Summary comments on employee performance

- Objective Setting & Staff Comments
- Technical Competencies
- Behavioral Competencies
- People Management (for Managers)
- Summary

Briefly comment on:
 - 3 - 5 key achievements during the fiscal year.
 - Development interests moving forward.

Objective Setting & Staff Comments

Objective * ✕ ✎

Provide sound administrative and logistic support to the division.

Description

Relates To
Events Management (Competency)

Category
Individual Objective

Due Date

Status
In Progress

Add

Summary

Manager Evaluation	Employee Evaluation	✎
Comment Ms. *** has a very strong year.	Comment FY2020 has been a challenging year with the pandemic.	