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## ***Correspondence Memorandum***

**Date:** March 14, 2024

**To:** Executive Committee  
Employee Trust Funds Board

**From:** Lisa Dally, Director  
Office of Talent Management

**Subject:** Steps/Timeline for the ETF Secretary's Evaluation Process and  
Supervisor/Manager Survey

**This memo is for informational purposes only. No Committee and Board action is required.**

### **Background**

In December 2008 the ETF Board (Board) approved a performance evaluation form to assist in evaluating the Secretary in June of each year. The Board also approved the use of a survey among ETF managers as a source of additional information the Executive Committee (Committee) can use in its evaluation of the Secretary's performance. The survey questions are aligned with the categories on the performance evaluation form and cover management of operations; member/employer services; external relations; leadership; and staff development.

The Board utilizes both documents in its yearly evaluation of the ETF Secretary.

### **Response Rates**

In order to maintain confidentiality of our supervisors/managers while also providing an incentive to be forthright in their evaluations of the Secretary, the survey responses from the managers have always been kept confidential. Unfortunately, this also reduces compliance with taking the survey because I am unable to determine who has completed the survey and who has not.

Using the methodology explained above, the response rate in 2023 was 89% which was 12% higher than the previous year. I will again stress the importance of the survey and will highlight in the cover letter to supervisors/managers that the Board is asking for 100% participation.

Board	Mtg Date	Item #
EXC	03.27.24	7B
ETF	03.28.24	4A1

Steps/Timeline for the ETF Secretary's Evaluation Process and Supervisor/Manager Survey

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Staff will be at the Committee and Board meeting to answer any questions.

Attachment A: [2024 Steps/Timeline](#)

Attachment B: [Supervisor/Manager Survey](#)

Attachment C: [Board Secretary Annual Review Survey](#)