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Correspondence Memorandum

Date: March 18, 2025

To: Executive Committee
Employee Trust Funds Board

From: Travis Dillon, 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 or Board action is required.

Background

In December 2008, the Employee Trust Funds Board (Board) approved a performance evaluation form to assist in evaluating the Department of Employee Trust Funds (ETF) Secretary in June of each year. The Board also approved the use of a survey among ETF supervisors/managers as a source of additional information for 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

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 supervisors/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 2024 was 73% which was lower by 16% than the previous year, some of which was affected by newer supervisors/managers joining ETF. 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	03.26.25	6B
ETF	03.27.25	4A1

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I will not be available at the Executive Committee or Board meeting, but ETF's Assistant Deputy Secretary, Pam Henning, will be available to answer any questions. I look forward to seeing you in June.

Attachment A: [2025 Steps/Timeline](#)

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

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