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**The Production of Merit:
How Managers Understand and Apply Merit in the Workplace**

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Abstract

In this article, we develop a *process model* that specifies how managers come to understand and approach the evaluation of merit in the workplace. Interviews from a diverse sample of managers and from managers at a U.S. technology company, along with supplemental qualitative online review data, reveal that managers are not blank slates: We find that individuals' understandings of merit are shaped by their (positive and negative) experiences of being evaluated as employees prior to promotion to management. Our analysis also identifies two distinct managerial approaches to applying merit when evaluating others: The *focused* approach, in which managers evaluate employees' work actions quantitatively at the individual level; and the *diffuse* approach in which managers assess both employees' work actions and personal qualities, quantitatively and qualitatively, at both the individual and team levels. We further find that as a result of their different past experiences as subjects of evaluation, individuals who experience mostly negative evaluation outcomes as employees are more likely to adopt a focused approach to evaluating merit, while individuals who experience mostly positive evaluation outcomes are more likely to adopt a diffuse approach. Our study contributes to the scholarship on meritocracy and workplace inequality by showing that merit is not an abstract concept but a guiding principle that is produced and reproduced over time based on individuals' evaluation experiences in the workplace.

Merit is widely considered a fair and legitimate principle for guiding employment decisions in today's organizations (see Scully 2000; McNamee and Miller 2004; Cooper 2015). In the United States, in particular, the norm of providing opportunity for all and rewarding individuals based on their merit—regardless of their gender, race, class, or wealth—is fundamental to the American Dream (Kluegel and Smith 1986; Ladd and Bowman 1998; Lemann 1999; Longoria 2009). Accordingly, employers are encouraged to use merit as a standard to select job applicants and to distribute rewards among employees (Eskew and Heneman 1996; Cappelli 1999; Osterman 1999). Throughout the world, such meritocratic efforts are celebrated for promoting equitable career prospects for all employees (Ospina 1996; Scully 2000; Dobbin 2009).

Given the pervasiveness of merit as a professed value in the workplace, organizational scholars have paid attention to the implications of using merit for selecting, promoting, and rewarding individuals belonging to different demographic groups (for a review, see, e.g., Petersen and Saporta 2004; Roth 2006; Castilla 2011). Many empirical studies in this research tradition have focused on testing whether such merit-based allocative and evaluative processes are indeed successful at reducing bias in employment outcomes (e.g., Elvira and Graham 2002; Shwed and Kalev 2014; Castilla 2016; Rivera and Tilcsik 2016). These studies have found that demographic inequality persists even with the adoption of merit-based practices (e.g., Castilla 2008; Dencker 2009; Yang and Aldrich 2014).

Despite the progress made in studying the consequences of employers' merit-based practices for the careers of employees, less well-examined is how the concept of merit comes to be understood by key organizational decision makers. Literatures in sociology, management, political philosophy, and applied HR, among others, have long documented that merit is multi-faceted and complex in practice (for a review, see, e.g., Scully 2000; Cech and Blair-Loy 2010; Stryker, Danielson and Schrank 2011; Posselt 2016). While merit is clearly distinguished from any demographic, aristocratic, or class-based criteria, whereby birth/family privileges or ascriptive characteristics influence an individual's success (Scully 1997; Castilla 2017), what constitutes merit in organizations still remains unclear.

Our study is aimed at unpacking this complexity in the concept of merit. In particular, we explore how managers themselves—those in charge of implementing merit-based practices at their organizations—come to understand and apply merit when making decisions about hiring, advancing, and rewarding employees. Such

an exploration into the antecedents of managers' understandings of merit, we argue, may offer novel insights into the challenges underlying the implementation of merit inside organizations. We propose a *process model* embedded in a stage model that identifies the main stages and mechanisms through which individuals—at first as early-career employees—arrive at their personal understandings of merit, and later, as managers, apply merit in their evaluative decisions of others. We developed our model inductively by analyzing unique qualitative data collected from 41 interviews with a diverse sample of managers experienced at making merit-based decisions (Sample 1). To supplement that first set of interviews, we interviewed 11 managers at a large U.S. technology company that uses merit to inform employee evaluations and rewards, henceforth called Bay Area Corp (Sample 2a). We also collected and analyzed 56 qualitative reviews of employment-related decision-making, written and posted online by managers at Bay Area Corp (Sample 2b). The key advantage of using such interview and review data, containing open-ended discussions of merit, is that they allow us to theorize about managers' understandings and approaches to evaluating merit (Flick 1998).

Our analysis reveals that managers' personal understandings of merit depend on their early career experiences as employees, which vary along three key dimensions: 1) content (*what* is being evaluated), 2) metric (*how* the evaluation is being conducted), and 3) unit (*who* is being evaluated) of evaluation. Upon entering the labor market, an individual's understanding of merit is shaped by their (positive and negative) experiences of being evaluated as an employee, prior to advancement to a managerial role. In this way, individuals' personal understandings of merit continue to evolve throughout their working careers. When we aggregate managerial understandings of merit in our data, we also discover two main clusters that map onto two distinct approaches to evaluating merit, what we term the *focused* approach, in which managers evaluate employees' work actions quantitatively focusing on the individual level, and the *diffuse* approach in which managers assess both employees' work actions and personal qualities, quantitatively and qualitatively, while considering the individual alone and as part of a team. Further, as a result of differences in their past experiences of being evaluated, we find that managers who experienced mostly negative outcomes when being evaluated as employees tend to adopt a more focused approach to merit-based decisions, while those managers who experienced mostly positive outcomes tend to adopt a more diffuse approach.

Our inductively-derived process model makes a number of contributions to our understanding of

meritocracy and workplace inequality. First, existing research has largely focused on documenting the demographic impact of organizational merit-based practices concerning hiring, job design/allocation, and promotion (see, e.g., Petersen and Saporta 2004; Castilla 2008 and Dencker 2009; Chan and Anteby 2016 for a review). Less attention has been paid to how managers themselves come to understand and apply merit-based practices affecting the careers of their employees. By focusing on the “production” of merit, our study shows that managers are not blank slates in how they first understand and later apply the distributive principle of merit in daily organizational life.

Second, recent scholarship has reported variation in the ways that managers make merit-based work decisions (e.g., Castilla and Benard 2010; Rissing and Castilla 2014). We posit that this variation in managers’ merit-based decisions might stem from differences in how these managers experienced evaluations when they were employees, resulting in two distinct managerial approaches to merit: the “focused” and the “diffuse” approaches. We note that neither approach is ex-ante better than the other for the evaluation of merit, but that the two can have dramatically different career implications for the employees being evaluated.

Finally, our results regarding variation in managers’ approaches to merit based on their early career experiences as employees builds on work suggesting that women and racial minorities experience differential performance appraisal criteria than white men (Cox and Nkomo 1986; Wilson 2010). We find that the women and racial-minority managers in our study, as a result of their relatively more negative past experiences as subjects of evaluation, tend to exclude factors that they perceived as contributing to their negative past evaluations from their understanding of merit, leading them to adopt more focused criteria when evaluating merit. This finding is important for theoretical and practical reasons, especially given the increasing efforts to advance women and racial minorities to management (see, e.g., Kalev, Dobbin, and Kelly 2006).

The Meaning of Merit

The ideal of meritocracy as a social system that rewards individuals based on merit is at the heart of human engagement, especially in post-industrial societies (see, e.g., Lemann 1999; Kunovich and Slomczynski 2007). Since the turn of the twenty-first century, organizations have strived to promote “meritocratic” workplaces (see Heneman and Werner 2005; Castilla 2008; Noe, Hollenbeck, Gerhart, and Wright 2008). In such meritocracies, employers measure merit and implement merit-based processes when

selecting job applicants, appraising workers' performance, advancing employees, and distributing rewards. Such organizational efforts are widely viewed as fair and as opportunity-enhancing for all (see Ospina 1996; Osterman 1999; Cappelli 1999; Scully 2000; Dobbin 2009).

Given the broad appeal of promoting meritocracy in the workplace, organizational scholars have focused on investigating the consequences of using merit and merit-based processes on employees' careers (for a review, see, e.g., Jackson 2007; Castilla 2008; Rissing and Castilla 2014). This is in response to prior work that found demographic inequality in workplace evaluations and outcomes (see, e.g., Petersen and Saporta 2004; Kmec 2005; Fernandez and Fernandez-Mateo 2006). For example, in the 1970s and 1980s, in the wake of the EEOC being established in the United States, scholars investigated how performance appraisals were experienced differently by women and racial minorities compared to white men (e.g., Beatty 1973; Huck and Bray 1976; Cox and Nkomo 1986; Wilson 2010). Thus, a key recent question of interest among inequality scholars is whether using merit as a distributive principle reduces demographic disparities in employment outcomes (for a review, see Roth 2006; Castilla and Benard 2010; Castilla 2011).

Many empirical studies have indeed found that demographic inequality persists even after the adoption of merit-based practices (see Dencker 2009; Johansson and Śliwa 2013; Śliwa and Johansson 2014). Castilla (2008) shows that at one large U.S. company that encouraged rewarding merit, women and minorities received lower merit-based pay increases than white men (in the same job and work unit, with the same human capital and the same supervisor) even after being given identical performance-evaluation scores. In the context of employment of foreign nationals, Rissing and Castilla (2014) find that, even though discrimination on the basis of nationality is unlawful in the U.S., government agents approve certification to work differentially, depending on immigrants' foreign citizenship, after controlling for qualifications relevant to the job and the employing organization. Similarly, Yang and Aldrich (2014) show that, despite merit-based guidelines, gender inequality persists in the leadership of mixed-sex entrepreneurial teams at startups.

While significant progress has been made in studying the *consequences* of employers' merit-based practices for employees' career outcomes, surprisingly, less research has focused on the *antecedents* of the managerial understandings of merit. Scholars have documented how measuring merit is multi-faceted and complex in practice (see, e.g., McCoy and Major 2007; Cech and Blair-Loy 2010; Khan 2010; Lamont 2010;

Stryker, Danielson, and Schrank 2011, among many). Scully (2000), for example, describes merit as a “dominant ideology” and a “broad, elastic” concept that operates to favor elites and reproduce their privilege. Roth (2006) also argues that many Wall Street companies often adopt subjective understandings of merit that allow stereotypes and biases against women to enter performance evaluation (see Gorman 2005 for a similar argument in the context of law firms). Thus, Roth (2006) suggests that whether any particular professional is deemed meritorious depends not only on formalized benchmarks of achievement but also on individual ascriptive characteristics such as gender and race. Further, Rivera (2012) stresses how the way individuals fit into their team and organization, along with that organization’s work culture, influences employers’ evaluation of “merit” during recruitment and hiring.

In this article, we start unpacking the complexity in the concept of merit by studying how managers themselves, who make decisions impacting the careers of their employees, come to understand and apply merit when evaluating others in their workplaces. In particular, we identify and develop a *process model* embedded in a stage model as a framework for explaining variation in managerial understandings of merit and also for examining the sources of such variation. We also explore heterogeneity in approaches to evaluating merit among managers with different experiences being evaluated as employees.

Data Collection and Analysis

This study draws on data collected from 52 in-depth interviews with U.S. professionals whose managerial experience is wide-ranging. The first sample (Sample 1) consists of professionals with managerial experience enrolled in a graduate MBA program at a U.S. business school (n=41). The second sample (Sample 2a) consists of working managers at a large Silicon Valley technology company, hereafter called Bay Area Corp (n=11). We also collected qualitative reviews (Sample 2b) by a different set of managers working at Bay Area Corp (n=56) describing how managerial decisions are made at Bay Area Corp. These reviews were from a website where current and former employees post anonymous reviews of companies. All managers in Samples 1 and 2a volunteered to be interviewed. Interviews in Sample 1 are labeled #1000 onwards; interviews in Sample 2a are labeled #1301 onwards; reviews in Sample 2b are labeled #1501 onwards.

Sample 1. We chose an MBA population for Sample 1 because we wanted a sample of managers with a

variety of professional and personal backgrounds. Furthermore, professionals enrolled in a graduate business program could talk openly about their work experiences because they were no longer affiliated with their former employers. These individuals, who had an average of three years of experience supervising employees, discussed both managing employees and being managed themselves; this double focus helped us develop our process model. Further, one goal of graduate business programs is to prepare students to fill senior positions with managerial responsibilities, including evaluating and rewarding employee merit. Thus, we found that the program in question primed professionals to think deeply about merit, ethics, and morals in organizations (see Anteby 2016 and Rivera 2016 for similar arguments). We also found that the MBA interviewees were eager to talk about their experiences as employees as well as their supervisory/managerial experiences. We initially conducted 45 interviews with the MBA population but dropped four interviews in order to restrict the sample to managers who had worked for explicitly meritocratic organizations.

Samples 2a and 2b. We additionally interviewed managers at Bay Area Corp (Sample 2a). Interviewing managers at a single company (and location), with similar job responsibilities, who supervised employees with similar professional and educational backgrounds, enabled us to investigate merit in a well-defined specific organizational context. We were only able to perform 11 interviews for Sample 2a, as the organization placed limits on how (often) we could recruit interviewees (this and other organizational restructurings precluded collecting more interview data). Given the limited number of interviews that we were able to collect for Sample 2a, we supplemented these interview data with data on anonymous reviews written by Bay Area Corp managers and posted on an online platform; this material became Sample 2b. The anonymity guaranteed by the online review platform enabled managers to be particularly frank in their accounts, an asset for our research purposes.

Methods. At the beginning of each interview, we administered a two-page survey to collect demographic and attitudinal data. Table 1 reports the main descriptive statistics for our combined sample of 52 managers and for Samples 1, 2a, and 2b separately. (Note that we have scant demographic data on Sample 2b because online reviews are anonymous.) Of the managers we interviewed, 32 percent were

women, 6 percent were African American,¹ 38 percent were Asian American, and 13 percent were Hispanic. The managers were, on average, 32 years old (a standard deviation of 5.9), with 7.8 years of work experience (a standard deviation of 5.7), and three years of managerial experience (a standard deviation of 3.9). On average, they supervised 12 employees, with a standard deviation of 32 (six had managed more than 20 employees). We measured how much our managers enjoyed supervising employees using a 7-point Likert scale (from 1= “I do not like it at all” to 7= “I like it very much”). The average value was 5.27; 88 percent of respondents chose a value of 5 or higher. Note the differences between Samples 1 and 2a: Managers in Sample 2a had longer work experience and were more likely to be male, older, married, and parents.

[Table 1 about here]

The interviews lasted one hour, on average (with a standard deviation of 22 minutes), and employed a semi-structured format. (The complete interview protocol appears in Appendix A.) We asked our questions in a conversational style, using language familiar to the interviewees and letting the discussion evolve in keeping with the managers’ responses. We also probed respondents’ answers to elicit stories, illustrations, and elaborated arguments (Spradley 1979). The interviews focused on practices and routines that the managers encountered at their companies, and in particular on how they perceived these practices. We also asked who deserved to get ahead in organizations, eliciting examples from the respondents’ experiences. Finally, we probed managers’ understandings of merit, and specifically the implementation of merit in the workplace. Of note is that we did not use the word *merit* until the participant did so or until later in the interview (if the participant had not yet done so). We adhered to this practice in order to elicit managers’ preconceived interpretations of merit, rather than invoking definitions used in corporate discourse.

The use of interviews was essential to our study. A key advantage of the interview method is that managers’ viewpoints are likely to be expressed relatively openly (Flick 1998). Interviews also tend to reveal managers’ (implicit) knowledge and opinions in the form of answers to standardized questions, and these answers become accessible to interpretation. A disadvantage of this interview method is that our data provide retrospective, general accounts. As a result, we are unable to know the extent to which our respondents’

¹ Despite our best efforts, we were only able to interview three African American managers. The percentage of African American managers in our sample is quite similar to the representation of African Americans in the studied MBA program at the time of our interviews.

statements are complete and true accounts of the underlying events being described. It is our impression, however, that the interviewees described episodes that they perceived as most salient and influential in their own careers.

The interviews were digitally recorded and are available upon request. The transcripts of the 52 interviews and the 56 online reviews, along with our interview notes, serve as the main empirical foundation of this study. The data consist of more than 1,400 single-spaced pages of text. For Sample 2b, we started with the population of reviews written by current and former employees and managers at Bay Area Corp. We first restricted the sample to reviews written by current managers, resulting in a sample of 400 reviews. Then, because reviews can pertain to any aspect of the company, such as the food and fitness facilities, we further restricted the sample to reviews that included at least one of the keywords *merit*, *performance*, *evaluation*, *bonus*, and *review*, reducing the sample to 56 reviews (on average, 125 words long). We chose these keywords because they capture understandings of merit and were used frequently in our interviews. This approach resulted in a reasonable overall sample size. We considered other words, such as *promotion* and *recruitment*, but found that they were used infrequently in the reviews.

Data Analysis

Our analytic process was highly iterative, consisting of several rounds of axial coding and frequent consultations of the literature as new themes emerged. (Appendix B describes the main phases of this analysis.) We adopted methods from prominent articles similarly describing the identification of process models, particularly influenced by the research of Kaplan and Orlikowski (2013) and Ibarra (1999). In conducting our analyses, we also adopted the practice of “expanding through surplus data” where we went back to previously collected data “to enable different kinds of analyses, many of which [were] undefined a priori, and whose need only [became] apparent through the analytic process” (Behfar and Okhuysen 2018: 332). This is common practice in qualitative research: For example, Bailyn (1977: 100) describes in one of her seminal articles that “an analysis that started with a concern with women’s careers ended with a concept applicable to men’s relation to their own work.” A consequence of this practice is that some aspects of our model depend on parts of our data that were not central to our original interview protocol; however, we think that the benefits of being able to flexibly explore different or new aspects of the phenomenon under study

outweigh the costs.

We first coded all 52 interviews in Sample 1 and Sample 2a, which we combined to explore individuals' understandings of merit in an open-ended fashion. We went into the field without any pre-conceptions about what to expect and approached our coding in an open-ended manner. We initially coded line by line and then did so paragraph by paragraph, using the Atlas.ti qualitative software package, which is designed to facilitate grounded theory coding and analysis (Charmaz 2006). Coding of interviews was performed in collaboration with a team of three research assistants (for a similar approach, see, e.g., Kelle, Prein and Bird 1995; Guetzkow, Lamont, and Mallard 2004). The Atlas.ti software package enabled us to increase inter-coder reliability by standardizing the set of codes, tracking the codes assigned by each coder, and allowing each transcript to be coded by one coder and checked by another. The codes were derived inductively: Initially all three coders coded the same transcripts and developed their own coding scheme. The coding scheme was then standardized, and the transcripts were split randomly among the coders. After this round of coding, the coders exchanged transcripts and verified/improved each other's coding.

In the first phase of our study, we coded only passages that explicitly mentioned merit. In the second phase, we employed a finer-grained coding scheme to identify talk that shaped understandings of merit even when merit was not explicitly mentioned. Using Atlas.ti, we attached labels or codes to portions of text while reading through transcripts of the data. If necessary, portions of text were assigned multiple codes. This process generated 63 codes identifying common themes in the data. We then grouped like-coded data into categories for further analysis (Corbin and Strauss 1990, 2007). For example, the initial codes "talent," "intelligence," and "qualities" were bundled into *ability*, a code that refers to an individual's innate capabilities. We continued this iterative process of coding and categorizing each paragraph of each transcript using grounded analysis. This coding process was guided by literature on how individuals make sense of culturally complex terms such as *professionalism*, *love*, and *diversity* (see Barley, Bechky, and Nelsen 2016; Tavory and Swidler 2009; and Bell and Hartmann 2007, respectively). Our first round of coding identified variation in managers' *personal understandings of merit* along three key dimensions: 1) *content*, 2) *metric*, and 3) *unit* of evaluation.

Because this set of interviews (n=52) was broad and diverse, we worried that the variation in

understandings of merit we had uncovered was attributable to the diversity of the organizations, occupations, and industries represented in Sample 1. In a second round of coding, therefore, we turned to an open-ended, inductive coding scheme, and used Samples 2a (n=11) and 2b (n=56) to determine whether different understandings of merit emerged even when looking at participants of a single organization, Bay Area Corp. We first coded the interviews in Sample 2a, and with some emergent themes we then moved on to Sample 2b, the reviews, to solidify our findings. This analysis revealed that even managers employed at the *same* organization varied in their understandings of merit. Furthermore, our analysis of these data from a single company found two clusters of understandings reflecting two very different *approaches to evaluating merit*: what we refer to as the *focused* approach and the *diffuse* approach. Probing data to find clusters is a common analytical approach to qualitative data, particularly in studies of cultural-meaning structures (see, e.g., Mohr 1998). There are many methods of clustering including MDS and QCA (e.g., Ragins 1987, 2008; Fiss 2011), but given our small sample set, we used a manual approach. We considered managers one by one, in order to identify where each was positioned along the three distinct dimensions of merit.

The identification of these two approaches raised a new question: What factors influence a particular manager's personal understanding of merit? To address this question, in a third round of coding we returned to the combined Samples 1 and 2a (n=52), this time inductively coding for how managers arrived at their understandings of merit. We used Samples 1 and 2a at this stage because of the combined sample's greater diversity and wealth of discussion around interviewees' struggles to come to an understanding of merit. The coding of these data revealed that individuals' early career *experiences of evaluation as employees*, including the *outcome of evaluation*, led to a *refinement in understandings of merit* that fed back into their own personal understandings of merit.

Thus, the three rounds of coding, collectively, led us to a process model that outlines how managers understand and apply merit in the workplace. Finally, inspired by Bechky (2011) and Pratt (2009), we explored whether there was variation in our main findings. In particular, we examined whether managers who experienced mostly positive evaluations when they were employees moved differently through our process model as compared to managers who experienced mostly negative evaluations. We performed this analysis first on Sample 1. We coded whether managers in the sample had adopted the focused or the diffuse

approaches to evaluating merit. We also coded each evaluation experience described by each of the 41 managers in this sample, whether the manager perceived its outcome as positive or negative, and how the manager had refined their understanding of merit accordingly. Once we had coded these variables, we matched the ID number attached to each interview to the demographics of the managers to identify patterns by gender and race. This inquiry responds to research calls to analyze how gender, race, and management intersect with merit (e.g., Ospina 1996; Spence and Keeping 2013). We then repeated this analysis using the smaller Sample 2a of managers working for Bay Area Corp.

The Process of Understanding and Applying Merit

In this study, we identify and develop a process model embedded in a stage model that articulates how managers come to understand and apply merit in the workplace. This model is presented in Figure 1 as a series of boxes (representing key steps) as well as arrows (representing mechanisms) connecting one step to the next. As shown, the model considers two key career stages in an individual's professional life: (a) as an employee being evaluated and (b) as a manager evaluating others. The main variables explained by our model are a manager's personal understanding of merit and application of merit.

[Figure 1 about here]

The process model depicts how an individual's personal understanding of merit is continually refined by experiences of being evaluated as an employee, prior to advancement to a managerial role. Our model describes how each evaluation that an individual experiences as an employee after entering the labor market iteratively affects their understanding of merit. An employee, through natural career progression, will encounter a series of hiring, promotion, and/or reward evaluations across their employing organizations. By comparing the realized outcome of these evaluation decisions against their own expectations, the employee comes to perceive each career outcome as positive or negative. Depending on how the outcome is perceived, the individual then processes the information to either include or exclude factors from their understanding of merit. Our data suggest that the factors included or excluded are, specifically, those believed by the individual to be decisive in past personal evaluations. If an evaluation is perceived as positive, the individual tends to include the factor that they believe to have been decisive. Conversely, when the evaluation is perceived as negative, they tend to exclude the decisive factor. In this way, individuals continue to refine and

internalize their revised personal understandings of merit throughout their working careers. Our model also specifies that this evolving understanding of merit possesses three main dimensions: 1) content, 2) metric, and 3) unit of evaluation (Appendix C provides definitions for these and other key constructs in our process model and also shows that the labels we picked for these constructs are rooted in our interview data.)

Then, our model shows that when an individual advances to management and has to make merit-based decisions, they seek to reproduce the fairness and/or rectify the unfairness they previously experienced when applying merit and evaluating employees. Our data helped to empirically identify two main clusters in the managers' personal understandings of merit that result in two distinct approaches to evaluating merit. The first approach, the "focused" approach, consists of evaluating only the work actions of employees, quantitatively, and focusing just on the individual level. The advantage of this approach, as described to us by the interviewees, is the limited source of bias that seeps into the decision-making process as the evaluation is clearly specified and there is no room for subjective interpretation or discretion.

The second approach, the "diffuse" approach, consists of managers evaluating both the work actions as well as the personal qualities of employees, where the evaluation is performed using both quantitative and qualitative criteria, and where the individual is considered alongside their position in their broader team. The advantage of this approach, as described by the interviewees, is that an employee can be evaluated "more holistically"—and factors that are hard to measure may be taken into consideration when evaluating merit. We used the labels "focused" and "diffuse" to characterize these two approaches since both terms were used by our interviewees (see Appendix C). Further, as we elaborate in the discussion section, the focused/diffuse distinction is one that has received attention in the inequality literature. Note that neither the focused nor the diffuse approach is significantly better than the other for the evaluation of merit, but notably, the two approaches can have dramatically different implications for the employees being evaluated.

Figure 2 illustrates our process model more vividly by depicting how one particular manager from Sample 2a (#1310) progresses through the process model to arrive at his personal understanding of merit and how he applies merit when evaluating employees. (It goes without saying that our analysis is limited to the experiences/evaluations that the individual in question chose to talk about.) Prior to entering the labor market, this professional, who holds an MA in Film and Television Production from USC, understood merit

as “being rewarded for using your skills to the highest and best ability.” Upon entering the labor market as an employee, this individual experienced two evaluation outcomes he considered positive and one he viewed as negative. The two positive outcomes of evaluation, both hiring decisions, led him to include “subjectivity” and “insight” as components of merit. The negative outcome of evaluation, a promotion decision, led him to exclude “personal interactions” as a criterion for evaluating merit. After experiencing these evaluations, he understood merit as “more about recognizing [whether] what [one is] achieving is important to the company.” Having experienced more positive than negative evaluations in his career, this manager described adopting a diffuse approach to evaluating merit “in a multi-faceted way.”

[Figure 2 about here]

In sum, our model sheds light on how early career experiences of being evaluated as an employee shape an individual’s personal understanding of merit and ultimately, their managerial application of merit in evaluating others. While we acknowledge that our process model likely simplifies what, in reality, is an involved process of unpacking merit, it begins to help explain how different managers may arrive at vastly different understandings and approaches to merit in their workplaces.

Heterogeneity in Moving through the Process Model by Evaluation Experiences

In our analysis of the interview data, we also examined patterns in how managers apply merit in the workplace based on their own early career experiences being evaluated as employees. In particular, we explored how managers who experienced mostly positive evaluations as employees moved differently through our process model compared to managers who experienced mostly negative evaluations.

We summarize our findings in Figures 3a (managers who experienced mostly positive evaluations) and 3b (managers who experienced mostly negative evaluations). We find that mostly positive evaluation outcomes result in *including* factors that led to such positive outcomes as part of merit, ultimately leading to a diffuse approach to evaluating merit. Here, the evaluation of merit is broad and holistic, and encompasses a diverse range of factors. Mostly negative outcomes, on the contrary, result in *excluding* factors from one’s personal understanding of merit, ultimately leading to a focused approach, whereby the evaluation of merit is specific and narrow. Note that a key point of difference between Figures 3a and 3b is the mechanism through which these managers translate their personal understanding of merit into their approach to evaluating merit:

Our data suggest that managers with mostly positive evaluation outcomes seek to *reproduce the fairness* that they perceived to have experienced in their own evaluations, whereas managers with mostly negative evaluation outcomes seek to *rectify the unfairness* that they described experiencing themselves. In this way, managers' approaches to merit are reflections of their different experiences being evaluated as employees. We suspect that the "focused" versus "diffuse" applications of merit could have noticeably different effects on employees' careers.

[Figures 3a and 3b about here]

Our data further revealed a demographic pattern to how different managers understood and applied merit. On average, white men in our interview samples described more positive employee-level evaluation experiences than women and racial minorities. We find that white male managers experienced more evaluations that they perceived had positive outcomes when they were employees, then included pertinent factors into their understanding of merit, and ultimately ended up adopting a diffuse approach to evaluating merit. By contrast, women and racial-minority managers experienced more evaluations that they perceived had negative outcomes, then excluded pertinent factors, and adopted a focused approach.² We depict this pattern using data from Sample 1 (n=41) and Sample 2a (n=11) in Table 2.

[Table 2 about here]

Table 2 shows the relationship between managers' applications of merit in evaluating others (diffuse versus focused) and the outcome of their own evaluations when they were employees (positive versus negative) by gender and race. We first analyzed Sample 1, depicted in Panel A. Of the 41 managers in Sample 1, 24 described following the focused approach and fifteen described using the diffuse approach (it was not possible to classify two managers' approaches to merit). We find that the majority of managers coded as using the focused approach were women or racial minorities; only one white male manager employed the focused approach to evaluating merit. In contrast, all the managers who used the diffuse

² There could exist some selection bias in the evaluation experiences that managers chose to mention. As we discuss later, future research should study how managers from different demographic groups differ in their choices of evaluative experiences to mention when talking about their career paths. We are also sympathetic to the possible objection that, unlike prior investigations of actual employment evaluations, we are investigating whether the evaluations were seen as having positive or negative outcomes. However, we expect perceptions of evaluations to go hand in hand with the actual evaluations. We also contend that perceptions of evaluations are just as important as the objective outcomes.

approach were white men. In total, 47 evaluations were mentioned in the 41 interviews. The white male managers described twelve positive evaluations and zero negative evaluations, and refined their understanding of merit more often by including pertinent factors into their understanding of merit; the women and racial-minority managers described eight positive and twenty seven negative evaluations and more often excluded pertinent factors after having experienced particular evaluations. These numbers might be small, but the pattern is quite stark.

We additionally analyzed Sample 2a, consisting of 11 interviews, to learn whether these findings persisted in a sample of managers within the same organization, Bay Area Corp. The results of this analysis appear in Table 2, Panel B, and broadly replicate the pattern we find in Sample 1. As can be seen, slightly more than half of the managers described using a focused approach and the majority of the managers coded using the focused approach were women or racial minorities. In Sample 2a, fourteen evaluations were mentioned in the 11 interviews. (One manager mentioned no evaluations, seven mentioned one, one mentioned two, and one mentioned three). The white male managers described six positive evaluations and one negative evaluation, and often included pertinent factors into their understanding of merit; the women and racial-minority managers described one positive and six negative evaluations and more often excluded pertinent factors from their understanding. The results for Sample 2a appear in Table 2, Panel B. Below, we further illustrate this phenomenon with a few examples.

Consider, for example, manager #1310, a white male manager from Lafayette, California. He described a hiring evaluation outcome that he perceived as positive. He was offered the job because of his connections and likeability, and described this as a legitimate and productive way to find jobs. He said, “I will claim, yes, that I am fantastic at identifying those hiring opportunities [through networks]. ... I have very few complaints. ... It looks like I have perfect timing.” When describing how this hiring outcome had influenced his understanding of merit, he said, “[In] doing hiring and promotions ... who actually has the best skills? ... I'm not sure there's ever an awareness of who has the best skills for things. ... Instead merit, for me, is ... so, it values the subjectivity ... In my opinion, [it's] a balance between ‘I understand the numbers’ and ‘I understand the feelings.’” As a result of this hiring experience, he incorporated qualitative criteria into his understanding of merit. This experience, combined with two similar evaluation

experiences, ultimately led this manager to his diffuse approach to evaluating merit. He justified this approach by saying, “that’s the fair way of doing it.”

In contrast, consider #1303, an Asian-American female manager who had lived in Massachusetts before moving to California for work. She described a promotion evaluation outcome that she perceived as negative: “People make different decisions based on the gender of the individual. ... [It’s] an impacting factor because women tend to be more gentle and not that outspoken, and then that’s a disadvantage. ... They may see like you are not driving things, right? ... Yeah, because then you just follow instructions and don’t really make a change, but for men, because of their ... Yeah, for men, most of them are more outspoken, I would say. So then they get a better chance. ... Women like me have less chances to get promoted precisely because of this.” This manager attributed the negative outcome to her “gentle nature.” When describing how this evaluation had affected her, she said, “A lot of factors will impact how you make a decision. But then sometimes you just have to look at the basic, what’s the right thing to do, based on the merit. I do feel that ... don’t think the promotion should be based on ... if your voice is louder ... It should just be based on what you have delivered.” Thus, this manager excluded “assertiveness” as a factor that should be considered in assessing merit, and ultimately adopted a focused approach to evaluating merit, justifying this by saying, “there [are] things we can change about the process that we think will make the process more fair or more effective.”

Having described our overall process model and how different managers move through this model, we now discuss in more depth each of the individual components of our model.

Illustrating Individual Components of the Process Model

Early Career Experiences as Employees

We find that managers’ understandings of merit are shaped by their early experiences at work as employees of organizations. In our coding of the data (particularly in response to question 14 of our protocol, see Appendix A), we observed that managers typically described a variety of personal experiences of evaluation as employees earlier in their careers, and then discussed how they perceived the outcomes of those evaluations to be positive or negative, and how in the end those experiences helped refine their understandings (and later applications) of merit over their professional life.

Three kinds of evaluative and selective processes were repeatedly mentioned in our interviews:

hiring/sorting, promotion, and reward decisions. Managers discussed, for example, “getting hired” and “switching to a new role,” “merit-based raises” and “merit-based rewards,” and “getting promoted for merit” or “meriting a promotion” (#1010, #1310). Managers further commented that these decisions emerged as a natural progression in their career. As one manager said, “So, early on in my career, I didn't really know a lot. I gotta be honest; I was a newbie. ... You have to find your career path...go through the hiring, the promotions, the performance evaluations, trainings, right?” (#1310).

Managers also described having perceived their evaluations as either positive or negative. Examples of evaluation outcomes perceived as positive were described to us by respondents using words such as “fair,” “appropriate,” “legitimate,” and/or “right”. One manager reported that, while seeking a job in Asia, he had experienced a series of negative evaluations. In Asia, he said, “The person who came from MIT definitely had more ... credit ... than people coming from Wesleyan, for example ... even though ... Wesleyan is pretty well-reputed in the United States, right?” (#1018). As a graduate of Wesleyan, he experienced many rejections. By contrast, another manager described having been hired as “employee number one” at a new venture as a positive experience. He explained that his boss “who was the founder and CEO ... knew exactly what he wanted ... [and] the kind of people he wanted” and paid little attention to other considerations (#1014). Individuals described assessing the outcome of their evaluation as positive or negative through the mechanism of comparing reality to their expectations. As one manager said, “I thought my pay was fair. [My employer was] like grandfathering people like me in from old systems who were not in line with the new system. My expectation was set by the old system. But they let me have more because I'd always had more and they didn't take it away. So I was content” (#1009).

Further, we uncovered that as managers emerged from each of these evaluative experiences in their careers, they refined their understandings of merit. In particular, depending on whether the experiences were perceived as positive or negative, we noted two specific kind of reactions: “including” certain factors as merit and “excluding” others as components of merit that resulted through the mechanism of processing the new information: the outcome of their evaluation. The typical pattern that we observed was that future managers who experienced what they considered positive outcomes of evaluation as employees included the factor that they believed had elicited the desirable outcome into their understanding of merit. Conversely,

when a future manager experienced a negative evaluation outcome, they excluded the factor that they believed had prevented the desired outcome from their understanding of merit.

For example, a manager at an architectural firm described having a positive experience with a recent promotion, after making “a good connection with [his] client.” He explained that “the principals literally decided [that] ... they liked me, so they fast-tracked me ... So it really came down a lot to the principals deciding” how to understand merit, at their own discretion (#1031). Processing this evaluation experience, which he perceived as positive, he mused: “How do you tell who is a good architect? It’s very subjective. ... There is no one definition of a good architect. ... There are good designers. ... There are people who have a very wide technical understanding of how to build buildings, ... and then there are people who are good at, like, the project-management roles.” Having been legitimately recognized for something “quite intangible,” he incorporated qualitative evaluations into his own understanding of merit.

Another manager, having beaten out the “genius” front-runner for a job and having perceived this outcome as positive, processed this information in the following way: “Those who really work their way through a problem and understand the underlying question ... they were the better, more meritorious scientists ... [as compared to the] guy who was really, really good at building things but wasn’t super organized” (#1310). This manager incorporated factors such as “working your way through a problem” and “being organized,” into his refined understanding of merit.

Appendix D offers four additional examples of how future managers progressed through key parts of our process model, in which their early career evaluation experiences later influenced their understandings of merit. One manager in our sample included work experience, another included hours worked, as a result of personal evaluation experiences that they considered positive. A third excluded personality assessment and a fourth excluded qualitative evaluations, in response to personal evaluation experiences that they considered negative. Finally, managers described having to internalize new understandings of merit after including and excluding factors as merit. As one manager summarized, “So I would say, it’s a process. I mean I can tell you what is written on paper at [my company] ... [but] where would, say I, sort of lie? Me, like personally? How I define merit ... that takes time to figure out” (#1000).

Variation in Managers' Personal Understandings of Merit

Our study additionally unpacks managers' varied definitions of merit that emerge from the iterative process described in the previous section. Our inductive analysis of the interview data uncovered significant variation in the meanings of merit among managers in our different samples. Table 3 presents a snapshot of a few managerial understandings of merit in our data.

[Table 3 about here]

Some managers equated merit with “effort”; others added into the mix innate “raw materials” and acquired “skills,” arguing that “merit is not such a straightforward thing.” Some managers asserted that appraisals of merit should focus on the individual; others included how one “behaves ... with peers ... and clients” and what one is “contributing to the company” or an “organization’s mission.” Some managers believed that merit should be assessed in terms of the company “resources” expended on an individual; others thought that merit should be evaluated by managers or via annual performance evaluations because “there’s at least a few ways to look at a deserving person.” In particular, our data revealed that managers’ perceptions of merit vary along 1) content, 2) metric, and 3) unit of evaluation. Table 4 presents data on each of these three dimensions.

[Table 4 about here]

1. Content of Evaluation. In our analysis of the data, we find evidence of a tension between actions and qualities in managers’ descriptions of the content of evaluation for merit. Typically, achievement refers to some kind of success that a person can attain on the basis of skills or efforts. What is acquired or intrinsic, in contrast, tends to be associated with learned and acquired abilities, or even traits beyond an individual’s control. In our data, the spectrum of managers’ responses ranged from specifying particular *work actions* that define merit to naming innate capabilities or *personal qualities* as manifestations of merit.

At one end of the spectrum, managers stressed that work actions, often characterized as “performance” or “effort”—what individuals do or concretely achieve, such as how one is doing the job and how hard one is working—are central to the understanding of merit. The idea here is that, regardless of individuals’ “natural endowments” or innate capabilities, only their work actions and performance contribute to their merit. For example, one manager said that “there's merit in you doing your job and doing it well, or doing it moderately

well or almost well,” and in “going above and beyond” (#1310). Similarly, another said that “merit would be more about effort ... [and] applying those talents. So you might have those talents but then decide not to apply them, ... [then] you are not putting merit to work.” (#1302). Many managers stated that a key factor in merit is how well individuals perform their jobs—for example, the product manager who launches a successful new product, the salesperson with the highest sales, and the programmer with the best quality and quantity of code are all meritorious (#1310).

At the other end of the spectrum, merit was understood in terms of innate “God-given” personal qualities, such as “passion,” “intelligence,” and “charisma,” as well as skills that one could acquire through practice, such as “technical skills,” “social skills,” and “empathy.” In one manager’s words, “Intelligence or charisma is a form of merit in and of itself, right, ... because ... not everybody has it” (#1001). Another manager understood merit in terms of being “smart” and being able to think “out of the box, ... [people] who don't want to follow a normal way of thinking. They basically think ahead, and they think futuristically” (#1309). A third manager characterized merit as being “self-motivated ... like you could manage yourself, you could go out and say, ‘Okay. I see a problem, I'm going to come up with a solution and enact it, get my colleagues to come along with me’” (#1009). Another understood talent at one’s job, such as having a flair for programming, as merit (#1027). Indeed, some managers such as this one described that not one, but two or more personal qualities together characterized merit: “I think there's certainly brilliance in terms of God's gift. ... Some people are born brilliant and some people are not so brilliant. ... When that brilliance is coupled with a drive—intense drive—I think it’s merit” (#1305).

Overall, managers varied strikingly in the extent to which they incorporated work actions and/or personal qualities into their evaluation of the content of merit.

2. Metric of Evaluation. There was also lack of consensus in our data about whether the metric or criteria of evaluation of merit should be quantitative or qualitative. Some managers asserted that merit should be evaluated quantitatively. They typically stressed the existence of organizational rules (specific systems of practices, procedures, and routines) whose goal is to ensure that merit is properly recognized and rewarded. As one manager commented, “People who come from a management background love to have a single

metric or ratio to drive [evaluation]” (#1307).³ These managers endorsed evaluating merit by means of these rules, which can be quantitatively measured. One manager declared that “[merit is] the business brought [by employees measured through] very quantifiable numbers” (#1014). Some mentioned specific metrics, such as GPA, used to evaluate potential hires (#1021), and the importance of reducing “20 different things” to “one metric” when making promotion decisions (#1307). Some described formal review processes, such as semiannual “calibration discussions,” in which they assessed subordinates and provided them feedback (#1008 and #1301). Finally, some managers described corporate policies defining how merit had to be evaluated. Such policies clearly articulated the requirements for advancement, such as time spent at work or seniority (#1008 and #1004). They even specified career tracks—such as “the managerial track,” “the individual contributor track,” and “the distinguished technologist track”—and the policies that governed evaluation of merit in each track (#1311).

At the other extreme, we find a preference for qualitative metrics or criteria in the understanding of merit. Some managers emphasized that, as one put it, a “lot of it isn’t some math” (#1302). For example, one manager said, “I work in a more creative side of the world, where it’s a lot harder to evaluate ... and there is a measured amount of subjectivity ... Sometimes ... inspirations are just the thing that is the most valuable to the business, in this kind of a scenario. You’ve got moments where a casual, offhand comment changes the way that you’re building all your servers, and all of a sudden everybody’s twice as effective because of that insight. I realize that’s an outlier, a data point that you cannot predict. Nor can you say, ‘And have one inspiration every three months,’ but you have to take that into account as well in evaluation. So there’s all kinds of fuzzy involved.” (#1310) Similarly, managers with finance backgrounds pointed out that investment bankers, for example, can be measured by several quantitative performance measures, such as overall revenues and fees generated, but that most banks qualitatively assess other factors, such as contributions to customer satisfaction (#1028).

Some other managers described merit as open to interpretation. They highlighted that organizations often use jargon to understand merit—ambiguous terms like “professionalism” and “achieving customer

³ In some cases, quantification even seemed to be forced onto the process of evaluation by managers in the context of jobs where performance does not naturally lend itself to quantification.

satisfaction.” Such concepts are not easily measurable and thus open to qualitative interpretation. Some managers mentioned how merit is rendered concrete only when understood and implemented by particular powerful individuals in the organization. These managers concluded that the understanding and evaluation of merit is invariably qualitative and left to the discretion of the manager. As one stated, “Yes, it's completely at the discretion of the boss. ... Yes, like 100 percent” (#1008).

In sum, managers’ opinions about whether merit should be evaluated quantitatively or qualitatively varied significantly.

3. Unit of Evaluation. The third dimension identified in our data is the specification of the appropriate unit of evaluation: the individual or the group. We find that this key difference between individual and group processes plays a role in managers’ understanding of merit. At one end of the spectrum, managers asserted that employees should be evaluated individually, one at a time. Many managers referred to the individual as the key unit of analysis when defining merit, and focused on each individual’s opportunity to rise in the company. One manager stated, “merit is about ... develop[ing] your own brand and PR campaign to support it, and to break yourself out of the masses” (#1302). Another said, “There are the guys who I want in the next level because I know [that, though] they don't know what it takes to succeed in the next level. ... I'm darn sure they're going to learn it on their own individual merit” (#1305).

At the other end of the spectrum, managers noted the teamwork-oriented nature of organizational work today, and argued for assessing individual merit in a more contextually rich manner with consideration of other organizational actors in the picture. Some managers believed that evaluation of merit should be group-based: The pie should be split equally among members. “With regards to being a ‘caring meritocracy,’ I think [my firm] probably did a better job than most organizations,” one manager said. “They [didn’t] want it to be like a cut-throat environment where people are stabbing each other in the back to get ahead. ... They wanted to promote a culture where people are cooperating, I would say, ... [where] people will collaborate and people will help each other out, and that defines merit” (#1000). Another said, “Well, I mean, I think one way to define merit is to what extent do people behave in a way that's good for the group, right? Or the organization or whatever, right? So, you could say that the more people exhibit behavior that's good for the group, then the more merit they have” (#1001).

Thus managers disagreed about the appropriate unit of analysis for the evaluation of merit: the individual alone or the individual as part of a larger whole.

“Focused” versus “Diffuse” Approaches to Evaluating Merit

The breadth and diversity of Sample 1—which represented many industries, occupations, and companies—raised the possibility that the variation we find in understandings of merit along three dimensions (content, metric, and unit of evaluation) stemmed from sampling diversity. In this sub-section, therefore, we focus on our analysis of Samples 2a (n=11) and 2b (n=56), which consisted of interviews with and reviews written by managers at Bay Area Corp, to assess whether (a) variation in understandings of merit persisted and (b) whether clusters of understandings of merit could be identified in a conservative sample of managers at one single organization.

Bay Area Corp predominantly hires engineers. In the online reviews that constitute our Sample 2b, managers described Bay Area Corp as having an “engineering culture” (#1508) that is “open” (#1515) and “transparent” (#1536). Some managers appreciated the “work environment” (#1516) and “benefits” (#1507); others complained about “politics” (#1549) and the attitudes of “senior management” (#1534). Almost 75 percent of managers in this sample stated that they would recommend the company to their friends. Overall, Bay Area Corp strongly advocates for a focus on merit in decisions about employees.

Our analysis revealed that personal understandings of merit varied among Bay Area Corp managers just as they did among managers in our broader Sample 1 along three dimensions (content, metric, and unit of evaluation). Some managers advocated focusing exclusively on employees’ *work actions* while others favored considering employees’ *personal qualities* as well. Similarly, managers articulated both *quantitative* and *qualitative* aspects of merit. Some understood merit exclusively at the *individual level*; others also considered the *broader team or organization*.

Our analysis also found two clusters in the personal understandings of merit—i.e., two configurations of the content, metric and unit of evaluation—that we labeled the “focused” and the “diffuse” approaches to evaluating merit. The “focused” approach represents the quantitative evaluation of employees’ work actions alone, at the individual level; and the “diffuse” approach represents the quantitative and qualitative evaluation of both work actions and personal qualities, individually and as part of a larger team. Table 5 presents

representative data of these two approaches. We describe that the focused approach consists of “delivering” and “achieving goals” where the focus is on a “specific person” (rather than a group) and the evaluation is measured using a narrow barometer. In contrast, the diffuse approach is almost understood in opposition to the focused approach because, as one manager pointed out, “There are problems with any metric or ratio” (#1307). Instead, the diffuse approach consists of evaluating “performance” and “intangible qualit[ies]” with an emphasis on how individuals “work by themselves” and “communicate with their team” and the evaluation is conducted “in a multi-faceted way” with managers considering “subjective factors” as well.

[Table 5 about here]

As part of our analysis, we coded the managers in Samples 2a, 2b and 1 to identify their approaches to merit as well as where each was positioned along the three dimensions of merit (these specific results are available upon request). In the analysis of the managers in Sample 2a, seven of the 11 managers described adopting the focused approach, and four the diffuse approach.

Additionally, to further assess whether there was face validity to these two distinct clusters, we turned to Sample 2b (n=56), the qualitative reviews written by a different set of managers at Bay Area Corp and coded them one by one. In Sample 2b too, some managers’ reviews reflected the focused approach to understanding merit. One said, “30% + growth was a metric I used for performance evaluation” (#1511). Another said, “Merit stems from performance reviews that are objective and related to your performance” (#1521). Other managers’ reviews critiqued the focused approach, arguing, for example, that “the company is too focused on weekly metric reviews” (#1526). One manager who described using the diffuse approach asserted that “merit is based on individual effort, business acumen, and dedication to the job or company” (#1532). Another said that “360-degree reviews must be done of tasks, performance, and people to evaluate merit” (#1515).

As in Sample 2a, we too find evidence of both approaches when coding the Sample 2b data. Of the 56 managers in Sample 2b, 26 described using the focused approach and 30 the diffuse approach. Our analysis of Sample 2b thus strengthens the generalizability of our findings (beyond a single organization) and also bolsters our argument that managerial approaches to merit are not simply products of organizational environments. Overall, our three samples are reassuringly consistent in revealing the two distinct managerial approaches to evaluating merit.

Discussion and Contributions

Merit and the ideal of meritocracy are at the heart of today's organizational life. In fact, employers' efforts aimed at using merit as a distributive principle—rather than gender, race, or wealth—are widely encouraged for promoting equitable and fair career outcomes for all. While prior work has long documented that merit is multi-faceted and complex in practice, few have studied this complexity, particularly how merit comes to be understood and applied differently by key organizational decision makers.

Our study offers a *process model* embedded in a stage model that outlines how managers, in charge of implementing merit-based practices, understand and apply merit when evaluating employees in the workplace. Our interview and review data reveal that managers vary in their personal understandings of merit along three key dimensions: content, metric, and unit of evaluation. We also find that managers derive their understanding of merit from their early career personal experiences as subjects of evaluation themselves. We also discover two main clusters around the content, metric, and unit used to evaluate merit, what we term the *focused* and the *diffuse* managerial approaches. Further, we find that, as a result of differences in their past experiences being evaluated as employees, managers who experience mostly negative outcomes as employees are more likely to adopt a focused approach to evaluating merit; in contrast, individuals who experience mostly positive evaluation outcomes are more likely to adopt a diffuse approach. Overall, a key theoretical insight of our article is that merit is not a reified, abstract or objective concept but something that is produced and reproduced over time based on peoples' experiences.

Implications for Merit and Workplace Inequality

Our inductively-derived process model has a number of important implications for the study of merit and inequality in today's workplaces. First, our model specifies early career experiences as one key antecedent of managers' understandings of merit. As illustrated in Figure 1, individuals include or exclude particular factors as components of their personal understanding of merit depending on their perceived (positive/negative) outcomes of their own prior evaluations, and continually refine such understanding over time until they are promoted to managerial roles. This inquiry thus advances scholarship that has mostly focused on investigating the consequences of merit-based practices on employee-level outcomes (see, e.g., Petersen and Saporta 2004; Roth 2006; Castilla 2008) without exploring the antecedents of merit,

particularly around specifying how managers come to understand merit. And the few study attempts aimed at considering these antecedents have mostly assessed the role of education and schooling (Guinier 2016; Posselt 2016), rather than managers' prior experiences as subjects of evaluation.

Second, while recent scholarship has reported demographic variation in the ways that managers make merit-based employment decisions (see, e.g., Castilla 2008; Castilla and Benard 2010; Yang and Aldrich 2014), our study offers a potential new explanation for the persistent workplace inequality despite the rising application (and celebration) of merit inside today's organizations. We find that variation in individuals' experiences of being evaluated as employees could, in turn, (re)produce variation in their own evaluative decisions when they later become managers, resulting in quite distinct "focused" versus "diffuse" approaches to evaluating merit. This may turn into a self-perpetuating system because as long as there are differences in the evaluation of merit now, these differences will continue to persist in the future. Our analysis further shows that even within a single organization with an identical set of organizational practices and culture, certain managers adopt more focused approaches to merit, while others adopt more diffuse approaches as a result of their own prior evaluation experiences. This finding thus cautions empirical studies against assuming merit as a common, widely known and accepted (even taken-for-granted) distributing principle in the specific organizational context under study. It also urges scholars to continue to "bring managers back in" when researching how allocative and distributive processes are understood and applied by managers themselves (akin to Reskin and McBrier 2000; Elvira and Graham 2002; Castilla 2011).

Finally, while previous studies have found differences in how women and racial minorities experience performance appraisals in organizations (Cox and Nkomo 1986; Wilson 2010), our study advances this perspective by documenting the resulting implications of these distinct employees' experiences for workplace inequality upon taking up managerial positions. We find that the majority of white male managers in our study tend to adopt the diffuse approach to merit while the majority of women and racial minorities tend to adopt the focused approach, as a result of their different experiences of being evaluated as employees. These demographically different managers attempt to reproduce their experienced positive outcomes or rectify their experienced negative outcomes upon assuming managerial roles. This finding is both theoretically and practically important as the demographic composition of management continues to

change in today's organizations (see, e.g., Kalev, Dobbin, and Kelly 2006; Ferguson 2015).

Limitations and Directions for Future Research

Our study uses interview data to investigate managers' understandings of merit. Inevitably, our research approach has limitations, which we hope will be addressed in future studies of merit and workplace inequality. First, though interviews are useful for eliciting informants' "offline" discursive views, whether such discourse is in fact implicated in managerial action and decision-making remains open for further investigation. So, while we consider our approach novel and useful, we do call for more observationally intensive research strategies to resolve the talk-versus-action issue. In particular, we encourage research efforts at analyzing other kinds of organizational texts, such as performance-review forms, employee manuals and training documents, job descriptions, and reward announcements, for example, to capture how merit is written about and implemented in the organizational context.

Second, our managers volunteered information about some employee-level evaluations and not others. Though this pattern raises questions about "missing data," identity-as-narrative psychology suggests that what one remembers, chooses to talk about, and incorporates into one's life story is what ultimately matters (McAdams 1996). Further, collecting an account of every single early career evaluation that a manager experienced would require future managers to keep diaries for many years or entail multiple interviews over time. Such approaches are potentially useful in future work and offer the added benefit of avoiding retrospection, but we consider our interview-based approach a productive first step that offers genuine insight into how managers come to understand merit.

Third, we also acknowledge that while our model starts with early career employee experiences, managers are probably making sense of merit long before they enter the workforce. Future work aimed at studying carefully the role of schooling, training, and occupational choice, for example, in individual's initial understandings of merit could be valuable. Additionally, in our process model, while we have identified one key "turning point"— perception of employee-level evaluation outcomes—that influence managers' understandings of merit, we welcome research attempts to explore additional turning points that could make our process model more dynamic. Similarly, while we outline two key reactions to the evaluation experienced—inclusion or exclusion of factors as merit—we hope that, going forward, researchers are able

to incorporate (and find evidence for) other potential responses into our process model.

Finally, expanding the size of Sample 2a—the interviews with Bay Area Corp managers—would have been desirable, as the organization placed limits on how (often) we could recruit interviewees. We therefore supplemented Sample 2a with Sample 2b, consisting of online reviews by managers of the same organization. We also recognize two possible shortcomings of Sample 1: As MBA students, these professionals were not embedded in their organizations at the time of the interview, but we posit that any resulting detachment could have made them better able to reflect on their experiences as employees. Further, our MBA sample underrepresents more collectivist, blue-collar industries. This might explain why we did not come across cases in our data where managers solely focused on team/organizational performance in understanding merit (they either focused on the individual or on the individual along with the team). While our data open new territory in merit research, we encourage future work to explore an even more diverse set of industries.

These limitations notwithstanding, our research can be productively extended in important ways. As our findings confirm, merit is not a uniformly understood distributive principle, especially by the managers in charge of making employee career decisions. Further, managers with different evaluation experiences as employees approach differently the evaluation of merit. Studying the relevance of particular dimensions of merit to specific organizational contexts could expand the contribution of our study. For example, a relevant empirical question is whether the structure of a company, or even of the particular company unit in which a manager is embedded, shapes how merit is first understood and later applied when evaluating others. It would also be useful to explore the extent to which distinct organizational contexts, characterized by varying degrees of ambiguity about how merit is measured, influence managers' understandings of merit (see, e.g., Castilla and Benard 2010; Rivera 2012).

Finally, our study offers practical lessons on the use of merit as a metric and legitimate guiding principle in today's organizations and institutions. Our process model to understand and apply merit in the workplace stresses the importance of paying close attention to how merit is operationalized and measured inside organizations with the goal of achieving the successful design and implementation of a variety of merit-based processes, such as the recruitment and hiring of applicants (e.g., Rivera and Tilsik 2016; Castilla 2016), pay-for-performance and merit-based rewards (Lazear 2000; Elvira and Graham 2002;

Castilla 2008), diversity initiatives (Kalev, Dobbin, and Kelly 2006; Davidson 2011), and team arrangements (Kalev 2009). We have shown how critical it can be to have a clear, usable, commonly-agreed-as-fair understanding of merit when implementing such initiatives in real workplaces. We also endorse disseminating such a common and usable understanding of merit to all employee, managers, and executives so that merit is understood and applied consistently and fairly in employment decisions that impact the careers of individuals in organizations that aim to be meritocratic.⁴

⁴ This practical recommendation is also in agreement with recent work promoting employer efforts to increase transparency in the processes and criteria used when advancing and rewarding employees (see, e.g., Castilla 2015; Bohnet 2016).

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Figure 1: The Process of How a Manager Comes to Understand and Apply Merit

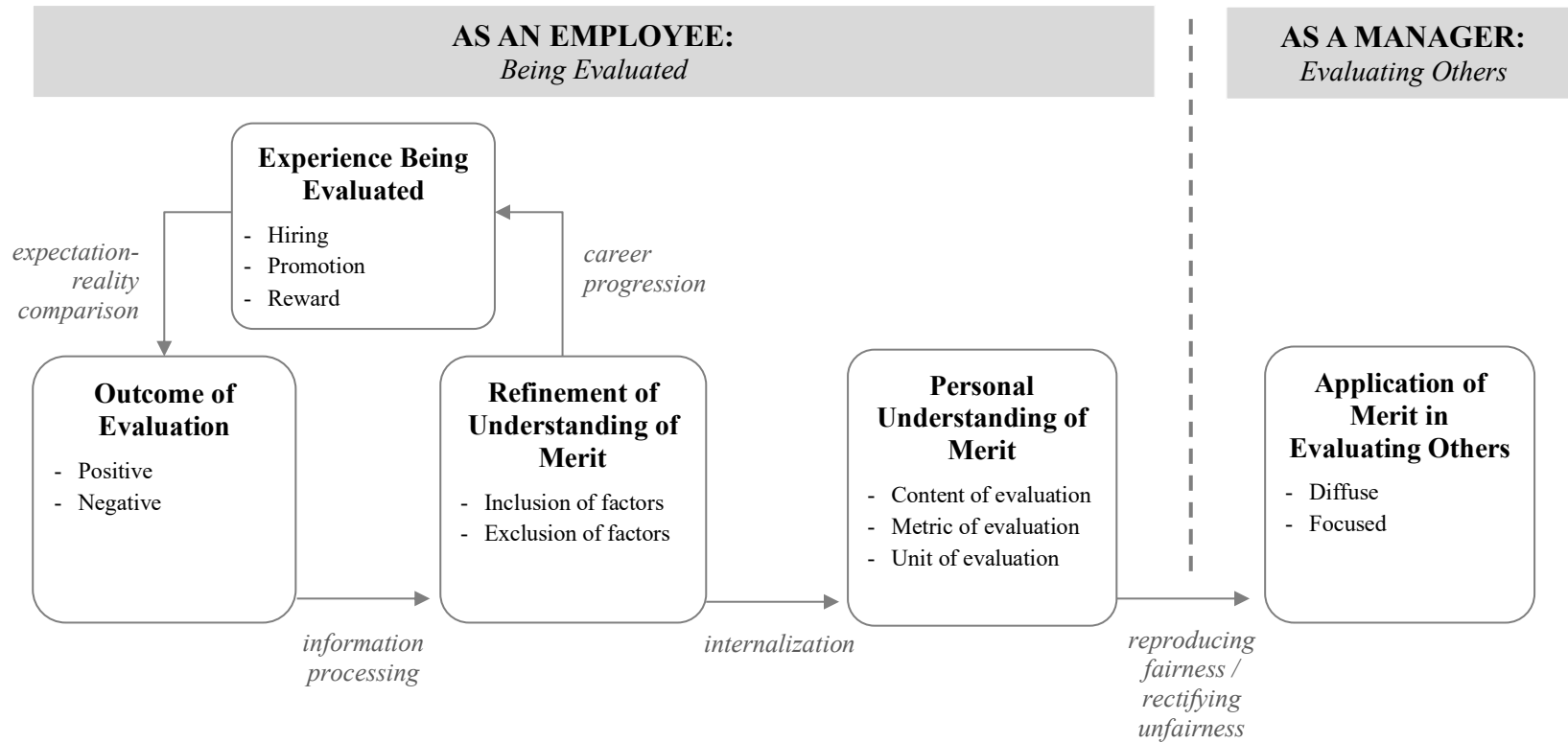


Figure 2: Example of an Individual’s Progress through the Process Model (#1310)

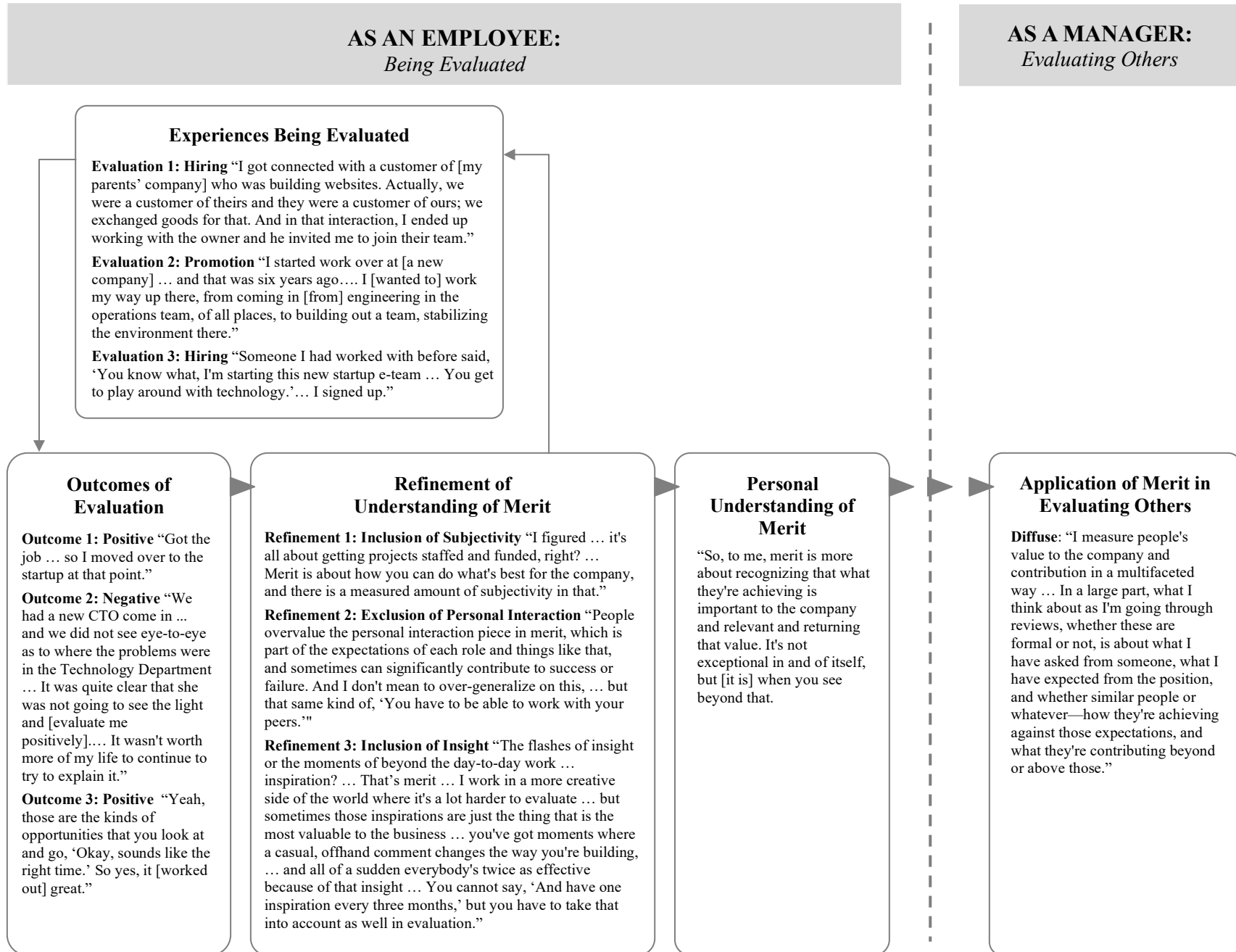


Figure 3a: How a Manager Who Experienced *Mostly Positive Evaluations* Comes to Understand and Apply Merit

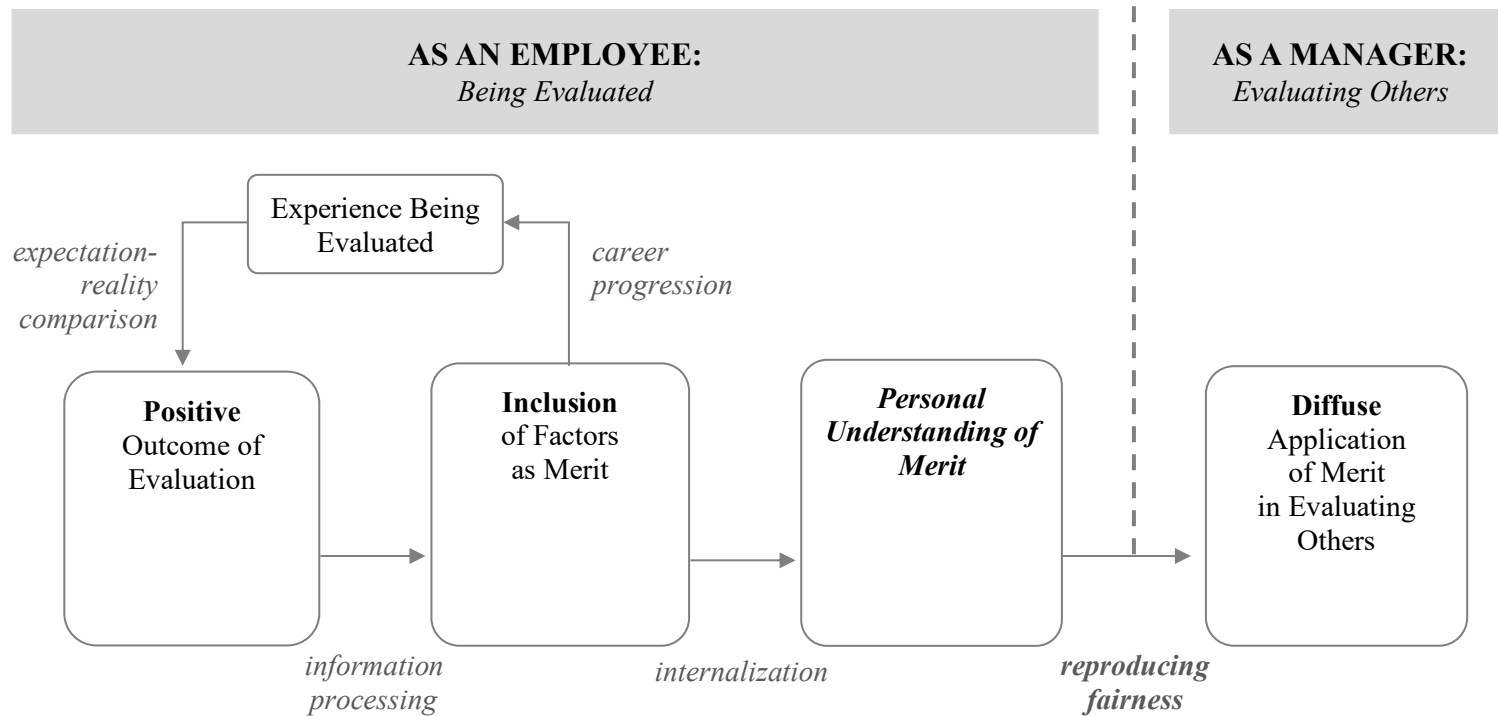


Figure 3b: How a Manager Who Experienced *Mostly Negative Evaluations* Comes to Understand and Apply Merit

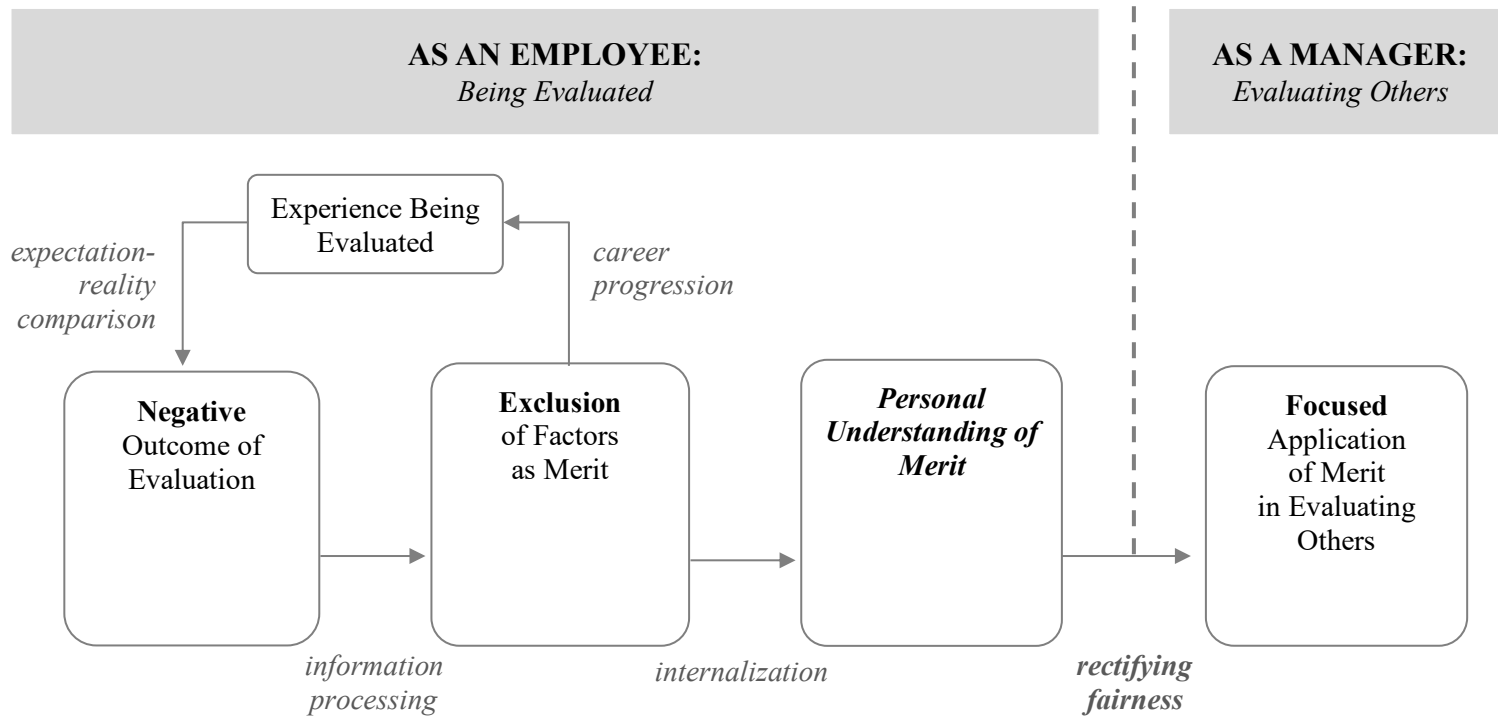


Table 1: Descriptive Statistics for Samples 1, 2a, and 2b

| | Overall Interviews (n=52) | Sample 1 Interviews (n=41) | Bay Area Corp | |
|---------------------------------|------------------------------|-------------------------------|--------------------------------|-----------------------------|
| | | | Sample 2a Interviews (n=11) | Sample 2b Reviews (n=56) |
| Gender | | | | |
| Male | 67.3% | 63.4% | 81.8% | N.A |
| Female | 32.7% | 36.6% | 18.2% | |
| Race | | | | |
| White | 42.3% | 41.5% | 45.5% | N.A |
| Asian | 38.5% | 34.1% | 55.5% | |
| Latinx | 13.4% | 17.1% | | |
| African American | 5.8% | 7.3% | | |
| Industry | | | | |
| Consulting | 25.0% | 31.7% | | |
| Finance | 11.5% | 14.6% | | |
| Manufacturing | 19.2% | 24.4% | | |
| Technology | 30.8% | 12.2% | 100.0% | 100.0% |
| Other | 13.5% | 17.1% | | |
| Age (years) * | 32.0 (5.9) | 29.5 (3.2) | 39.3 (7.3) | |
| Work Experience (years) * | 7.8 (5.7) | 5.4 (2.8) | 16.5 (5.3) | |
| Managerial Experience (years) * | 3.0 (3.9) | 2.3 (2.8) | 5.9 (5.9) | |
| Employees Supervised (number) * | 12.7 (32.2) | 14.4 (36.1) | 6.2 (3.9) | |

* Means and standard deviations are reported for interval or continuous variables.

Table 2: Summary of Coding Results: Heterogeneity by Gender and Race in Being Evaluated and Evaluating Others

| <i>PANEL A</i> | SAMPLE 1 | | | | |
|--|--------------------------|------------------------|----------------------------|-----------------------|---------------------------------------|
| | <i>Overall</i> (n=41) | Male | | Female | |
| | | White (n=10) | Non-White (n=16) | White (n=7) | Non-White[^] (n=8) |
| <i>As Manager</i> | | | | | |
| Application of Merit in Evaluating Others | | | | | |
| • Diffuse | 15 | 9 | 3 | 1 | 2 |
| • Focused | 24 | 1 | 13 | 6 | 4 |
| <i>As Employee</i> | | | | | |
| Outcome of Evaluations* | | | | | |
| • Positive | 20 | 12 | 4 | 2 | 2 |
| • Negative | 27 | 0 | 15 | 8 | 4 |

| <i>PANEL B</i> | SAMPLE 2a | | | | |
|--|--------------------------|-----------------------|---------------------------|-----------------------|---------------------------|
| | <i>Overall</i> (n=11) | Male | | Female | |
| | | White (n=5) | Non-White (n=4) | White (n=0) | Non-White (n=2) |
| <i>As Manager</i> | | | | | |
| Application of Merit in Evaluating Others | | | | | |
| • Diffuse | 4 | 4 | 0 | 0 | 0 |
| • Focused | 7 | 1 | 4 | 0 | 2 |
| <i>As Employee</i> | | | | | |
| Outcome of Evaluations* | | | | | |
| • Positive | 7 | 6 | 0 | 0 | 1 |
| • Negative | 7 | 1 | 5 | 0 | 1 |

* Some managers recounted more than one evaluation experience; thus the number of evaluation outcomes is larger than the number of managers in both samples.

[^]Two managers did not discuss merit; thus it was not possible to categorize their application of merit.

Table 3: Evidence of Variation in Personal Understanding of Merit

| | Evidence |
|-------|---|
| #1304 | <p>“For me, <u>merit is less about what you already know. It's about how you're able to adapt and pick up new things.</u> It takes time. It takes time to see how [employees] behave in the office and outside of the office. How they communicate, how much attention they pay to detail, like what happens when they make a mistake. Are they asking the right questions or are they asking questions at all, or are they just following me, right? I also have an intern who basically did exactly what I was telling him to do. So, if I tell him to go left, he'll turn around and go left. If I tell him, jump off the building, he'll probably jump off the building. Then I wouldn't recommend him to even be hired. ... That's not merit. ... That's potentially some form of loyalty, but it's not merit. It's not something that one day, if I leave, he can take my role and lead the company forward.”</p> |
| #1310 | <p>“So to me, <u>merit is more about recognizing that what you're achieving is important to the company ... and relevant and returning that value.</u> ... I expect that the company will reward based on what you're contributing to the company because that's the whole purpose of having an employee, ... to improve the company and make it more efficient, effective.”</p> |
| #1002 | <p>“I think <u>merit is the proportional reward for the effort</u> provided. ... So I put in a little bit work, I get a little bit of merit.”</p> |
| #1004 | <p>“<u>Merit means to me ... ah, I think, being competent enough to succeed in a role without expending the resources of the organization</u> for excessive training and development. So when you come into a role, for an experienced professional hire, you know, they put up job descriptions online, you apply for it, you got in, and you are well versed within that role. You are not expending resources from the organization in order to retrain yourself. So that's what I see as being meritorious, is coming into a position and being successful”</p> |
| #1008 | <p>“Merit should mean ... I don't know what it really means, but <u>merit should mean that they really ... the person that works hard, works well and behaves well with peers, [the company] and clients, those who walk the extra mile, those are the guys that are going to have the biggest, the best evaluation,</u> performance evaluation, at the end of the year. And if you don't grow, you're out. So the up or out system. So that is merit.”</p> |
| #1035 | <p>“Gosh, I don't know, merit, I don't know. Yeah, I guess people have raw materials, like their brain, you have a certain IQ to work with. And then you kind of personally decide how hard working you are willing to be, to either make up for stuff that takes you longer or you slack, I guess. It's a really ... I think in consulting you have to have both, like you do just physically, your brain works at a pretty high pace and you are willing to work just extremely, extremely hard. So, and then, yeah, I think <u>I'd define merit by that ... so just like having skills and then being willing to work hard.</u>”</p> |

Table 4: Evidence of Three Dimensions of Personal Understanding of Merit

| Dimensions | Evidence |
|-------------------------------------|--|
| <p><i>Content of evaluation</i></p> | <p><i>Work Actions</i> “I think it’s more ... I think merit is more just objective, <u>based on how you perform</u> rather than anything else ... more on how you’re doing the job rather than anything else, I think.” (#1005)</p> <p>“<u>Merit is purely about performance</u>. You have to work hard. So I don’t really discriminate because you’re black, white, or you’re from a different country or your English has a little accent. ... I couldn’t speak perfect English, I went through all this. I know how hard it is. But there’s one core path: you have to work hard. You have to prove you can do this well and you can do more than this well.” (#1021)</p> <p><i>Personal Qualities</i> “<u>Merit, in a way, is like a measure of this kind of passion</u> for doing the right thing. ... People hire me to be a product manager; they shouldn’t hire me to be a singer. [chuckles] I’m not a good person or a bad person. I’m a good product manager, I’m not a good singer. So it’s fit.” (#1307)</p> <p>“<u>It is really about the skills</u> that you’re bringing that are recognized. ... When I think of merit, ... are you being rewarded for your skills?” (#1310)</p> |
| <p><i>Metric of evaluation</i></p> | <p><i>Quantitative</i> “Merit is the business they got, <u>very quantifiable numbers</u>.” (#1014)</p> <p>“When I managed [project name], it was, ‘Are you awake? Do you notice when something goes wrong? Do you get that problem to someone who can solve it, if you can’t solve it yourself?’ The criteria were much more cut-and-dried and I imagine if you were a bank teller, you [ask], ‘Do you add up at the end of the day?’ ... or something like that. There are <u>some really clear criteria in every role</u>.” (#1310)</p> <p><i>Qualitative</i> “I think how you portray yourself can be meritocratic as well. Like why does meritocracy have to equal objectively defined variables? Why can’t meritocracy also pertain to subjectively defined variables? ... I think that your <u>managers are in a very good position to determine your growth and how well you’re doing</u> and what you need to work on.” (#1028)</p> <p>“I mean, there’s all these attributes for an individual in their phase of career ... that you have to <u>evaluate somewhat qualitatively because a lot of it isn’t some math</u>. It’s just what do you think, how do you feel that person has performed.” (#1302)</p> |
| <p><i>Unit of evaluation</i></p> | <p><i>Individual Alone</i> “I would say merit is something in which a <u>person does anything that is given to him</u> in an effective manner... If you don’t complete your job, tell that you were not able to do because of X and X factors, it’s okay with me, we’ll work it out. We’ll work out a plan on how to... But don’t say that something is complete when it’s not complete, because that puts a lot of pressure on a lot of people. A person with merit would not do that, a person with merit would... So, I would say a person has merit if he says a word and does it.” (#1308)</p> <p><i>Individual as Part of a Team</i> “<u>Individual merit doesn’t always work</u> ... It’s even worse when you’re trying to measure a particular person’s performance [when there] was a team of five people. They delivered this project, okay. It was on time and within the budget, but then how to spread [merit] within the five people? They could have different parts on this project and that’s even more complicated. So, yeah, and basically I think that our experience ... [taught us to have] this matrix and just to <u>pay the [team] bonuses from time to time based on their overall performance</u>.” (#1036)</p> |

Table 5: Evidence of Different Applications of Merit

| Application | Evidence |
|---|--|
| <p><i>Focused:</i></p> <p>Evaluation of work actions; quantitative; the individual alone</p> | <p>“Merit to me, is what did you do to make me say, ‘Wow, you deserve something over and above what you've already been given.’ ... Actually, two months ago, [we] had these things where you can give spot bonuses, spot awards, anywhere from \$500 to \$50,000. ... And there was an offshore person that was working on this for us and I said, ‘You know, <u>the sooner you get this turned around, the better.</u> I'd like to include it in the presentation for the team.’ I went home. The next day I came in; it was done. That was turnaround right there, because it was no easy task. And so I immediately put him for a spot award.” (#1311)</p> <p>“My ex-intern ... He's done a fantastic job dealing with some of the most innovative products, fun products. And yeah, I think this is where the merit came in. I said, ‘<u>Look, we know he's gonna deliver, right? We're not just recommending him because I'm friends with him.</u>’ In fact, I never knew him until we hired him. ... And he's not Chinese, in fact, he's Indian. And my ex-director was Caucasian. So race didn't play a factor, it was pure merit. He's younger than me. He has less experience than me but he's proven more capable than me.” (#1304)</p> <p>“I would say merit is something in which a person does anything that is given to him in an effective manner ... So I would say the <u>barometer should always be: this is the goal, did you achieve it or not?</u> Whether you achieved the goal in six hours or eight hours, it doesn't matter. ... We kind of need to reward them.” (#1308)</p> |
| <p><i>Diffuse:</i></p> <p>Evaluation of actions and qualities; quantitative and qualitative; the individual alone and as part of a team</p> | <p>“I used my assessment of the individual merit where I thought. ...It's hard to—I don't know how to describe it otherwise, like <u>merit as an intangible quality</u> of an individual, is more about their <u>engagement with others</u> and their <u>personal commitment</u>, rather than actually being able to do the work. They tried, they tried really hard. It seems like merit to me. ... yeah, predominantly I think there's individuals making <u>subjective decisions</u> based on how they feel about that individual.” (#1302)</p> <p>“I've had a situation, this is a recent situation, where you have <u>two very well-performing employees. But they have two different approaches.</u> ... So one was pissing off people, and one was really getting the same stuff done in the same time length, but being nice. ... So performance-wise, yes, they've achieved their goals, they've done what was asked of them. But one had a lot of complaints.... So that's sort of like one thing that goes into consideration of merit: <u>how they interact with others.</u> Are you <u>keeping it human?</u>” (#1306)</p> <p>“Merit does tie back a lot to that evaluation side of the world. ... I measure people's <u>value to the company</u> and contribution in a <u>multifaceted way</u>. ... A programmer who programs and gets things done, and doesn't have lots of bugs, and is relatively predictable ... also it starts to really depend on the person's <u>personality and inclinations.</u> It's hard for me to say, ‘This is what a deserving person looks like,’ because each of those scenarios looks very different.” (#1310)</p> |

Appendix A: Interview Protocol

Below we include the protocol we used in our interviews. The headings in italics were used to organize the presentation of our interview questions.

Introductory Remarks

Before we begin, I want to thank you for agreeing to this interview. I greatly appreciate your time and willingness to assist me in my research. This is a study trying to understand organizational practices inside contemporary organizations. We would be happy to share the results of this project but we will keep all names anonymous. Along the same lines, I promise you anonymity, and commit to keeping your responses secure and confidential. Do you have any questions? [PAUSE]

We'll start with a brief survey for background information and then get into the interview.

About Your Personal Background

Before we start talking about work practices and organizations, I hope you don't mind if I ask you a few background questions:

1. What is your birth year? _____
2. What is your highest educational level achieved?
 - Some High School
 - High School
 - Some College
 - College
 - Some Graduate School
 - Graduate School
 - Other. Please, specify: _____
3. How many years of work experience do you have overall? _____
4. How many years of managerial experience do you have overall? By managerial experience, we refer to experience supervising employees in organizations. _____
 - 5a. If you have experience with supervisory responsibilities, about how many employees did you supervise in your most recent position? _____
 - 5b. If you have experience with supervisory responsibilities, how much do you like supervising employees?

I Do Not Like it At All 1 – 2 – 3 – 4 – 5 – 6 – 7 I Like it Very Much
6. Do you like jobs with supervising responsibilities?
Yes No Don't Know
7. What is your gender?
 - Female
 - Male
 - Other. Please, specify: _____

8. How do you define yourself ethnically?
- African American
 - Asian
 - Hispanic
 - Other. Please, specify: _____
9. Are you married?
- Yes
 - No
10. Do you have children?
- Yes; if yes, how many? _____
 - No
11. Were you born in the United States?
- Yes No; if no, where were you born? _____
12. Where did you grow up?
13. Tell me about the last educational institution you studied at.
- 13a. Where did you go? What did you study? Did you like it?
14. Tell me about the last organization you worked for (industry, product information, etc...).
- 14a. What was your role?
- 14b. How was the culture there?
- 14c. How were your colleagues? What about your bosses? And subordinates?

About Your Current/Most Recent Organization

Now, if you do not mind, we are going to ask you questions about your current organization or the last organization you worked at:

What are the core values of the organization?

- Would you say that there were certain underlying principles that guided how decisions were made?
- Were these values actually implemented in practice or just written down somewhere?
- Can you tell me of a time or an event where these values might have affected the way you handled a situation?

Do you think there were certain principles guiding the HR department and their functions such as recruitment, training, and/or promotion?

- Could you please illustrate with an example?
- Were these values prescribed to the HR personnel or do you think these were the values of the people who occupied these positions?
- Do you think these HR decisions in your organization were fair? How so?
 - Please give an example of a fair and unfair decision, if you have them.

Do you think your organization was fair in distributing resources among people, departments, or projects?

- What do you understand by fairness?

- According to Aristotle, there could be 4 ways of thinking about fairness: *merit* (the best get the most), *need* (the neediest get the most), *equality* (everyone gets the same), and *utility* (the distribution that affords the "greatest happiness for the greatest number")
- What do you personally subscribe to? If you were managing people, how would you make these decisions?
- What do you think your organization subscribed to?
- Do you think there is a disconnect between the way you think about fairness and the way your organization might have?

General Attitude about Getting Ahead

Now let us start talking about your general attitude towards getting ahead and who gets ahead in today's society:

Who deserves to get ahead in an organization?

Paint me an image of this deserving person

- What characteristics would they possess?
 - Organizational loyalty?
 - Takes initiative?
 - Team player?
- What about personal characteristics?

Who actually gets ahead?

- Why do they get ahead?
 - What is the relative importance of the following six characteristics:
 - talent
 - effort
 - connections
 - easiness of work
 - help received
 - luck
 - Please rank them in the order you think is important.

How do you understand the place of equality within organizations?

- What does equality mean?
- Should it be given any consideration?

What Do You think about These Stories?

We would also like to hear your reactions to some stories being told related to some of these topics:

Have you heard about the chancellor of New York's public schools, Mr. Klein? Well, he grew up in a Queens housing project as the son of a postal worker with a 10th grade education and then moved on to degrees from Columbia and Harvard Law and is now part of the New York City government.

- What do you think of this story?
- What specifically do you find striking?

How does this story relate to the 6 characteristics we thought about earlier?

- How common do you think such stories are?

Do these stories happen in organizations and in the private sector as well?

- Do you know of any such stories? Can you please share?

- Or do you think there are certain barriers that prevent these stories in the organizational context? Do you have an example to illustrate?

On Merit

What is merit?

- Sketch a situation for me where merit was used to make a decision.
- Were you the one making the decision? If not, who was?

Have you heard the term self-made person? What does it mean to you?

- Paint me a picture of a self-made person.

Do you think you live in a meritocratic world?

When people work hard, do they do better?

Do you think American organizations are meritocratic?

- How important is it for organizations to be meritocratic?

When people get jobs or are evaluated for better career opportunities or receive better training through their social networks or through power and influence, is that meritocratic? How do you feel about that?

- What about skills and effort in making progress in the organization?

Similar, unions have seniority provisions, which means that the employees who have the longest tenure might get the highest wage increases.

- Is that a problem?

Sometimes merit and equality might not be congruent. For example, a bonus could be awarded to a single mother of two children or someone else, both of whom are performing equally.

- In this situation, what do you think organizations would privilege? Take me through the thought process.

How context dependent is merit?

- When there are more positions, is merit easier to follow?
- When all employees are similar, is merit easier to follow?

Does merit intersect with other differences that people might have in any way?

- How so?

Imagine that you are in an organization and you have to make a couple of decisions, ok? Here's the first one. You have the performance evaluations of two people- a mother of two young children and a single man, both with exactly the same performance evaluations.

- Who would you promote? Why?

Here's another one. You receive two job applications for a certain position- a middle-aged African American man and a young, Hispanic teenager.

- Who would you give the job? Why?

You can offer training to two employees- an Asian-American woman and a Jamaican male immigrant.

- Who would you offer the opportunity to? Why?

For the previous three questions, can we talk through what guided your answers? What was the basis on which you made the decisions?

How do you feel about affirmative action or diversity managerial practices, or efforts to increase the presence of women and minorities in the workplace?

Alternative Factors

On Status

How important is status or social position in an organization?

- Does it matter for your success? In what way?
- How do you know if someone is of higher status than you?
- What privileges accompany higher status?
- How does status intersect with merit, hard work, luck everything we've been talking about?

On Cultural Capital and Education

How important is cultural knowledge about American corporate life in getting ahead?

- This includes the ability to make small talk about baseball or American Idol for example.
- Does this play a role in being successful?
- What about being able to discuss classical music or play golf?
- How do these relate to merit?

What about the education system?

- Does it emphasize certain values that affect the way organizations operate?
 - Competitiveness?
 - Quest for learning?
- Does it make it easier for certain people to advance?
 - How so?
 - Should it?
- At school, how do you think grades decisions are made? Are they meritocratic?

On Social Capital

Do you have anything to add about how much does "who you know" matter?

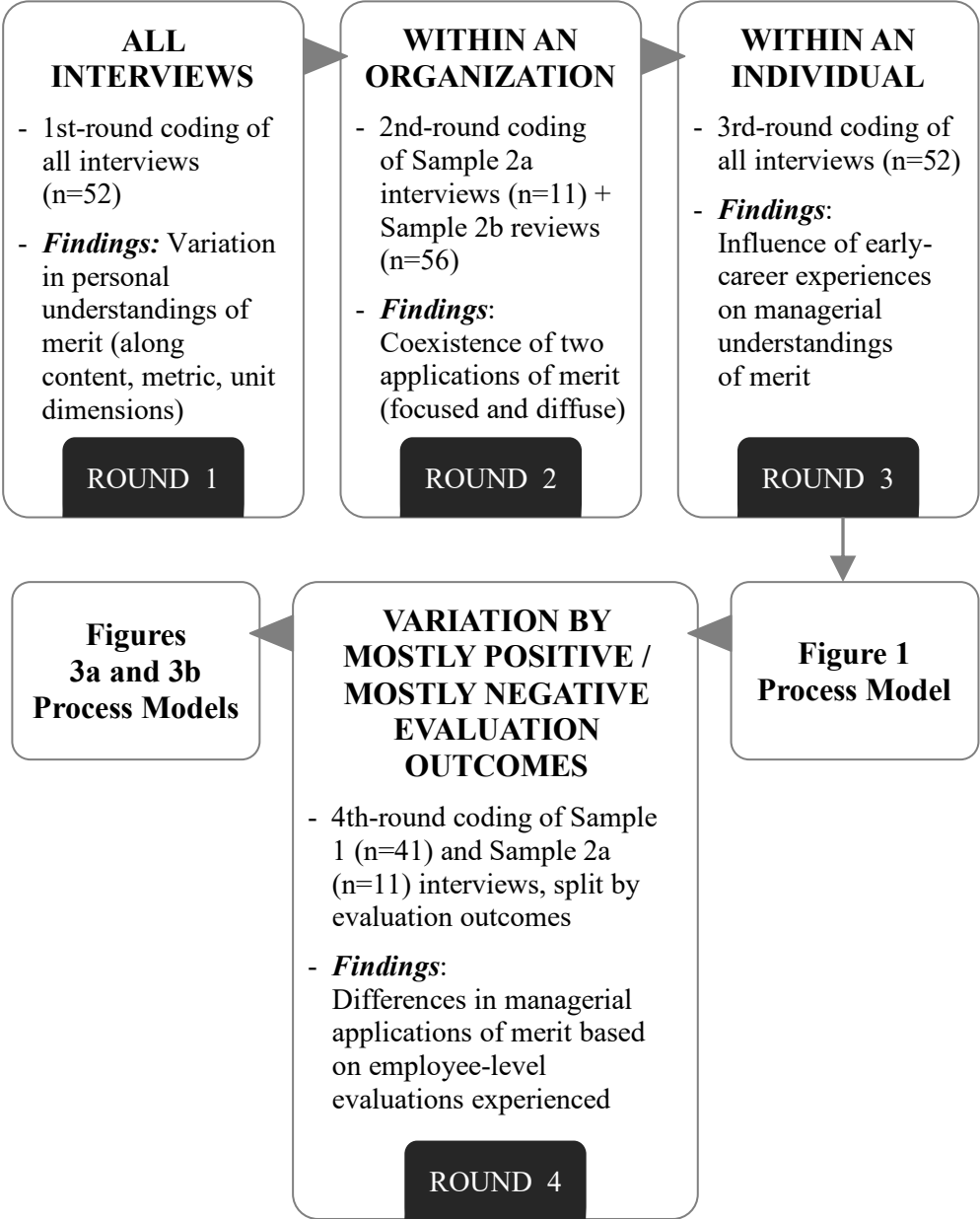
- How does this help?

How does merit compare to all of these?

Wrap Up

You have been very patient. Thank you so much. Is there anything else you would like to add to this discussion? If I have any follow-up questions, I hope it is alright for me to contact you.

Appendix B: Four Rounds of Data Analysis



Appendix C: Constructs in the Process Model: Definitions and Label Justifications

| Stage of Process Model | Construct | Definition | Data Motivating Construct Label |
|--|-----------------------|---|---|
| <i>Approach to Evaluating Merit as Manager</i> | Focused | One “right” way to approach merit | “But mostly...I think...I had a narrow, focused view on merit. I think that was something that some of the older staff wished had [not been the case]. They felt like they had a level of expertise that was either not understood or not respected as much because they didn't have the specific expertise that those that did well had...” (#1023) |
| | Diffuse | Multitude of ways to approach merit | “So, basically... Yeah, so I’m very, I guess, diffuse about merit...I think part of it is like communication skills and being able to be in front of a client...And I think the other thing is just like [do I] kind of like you [and] think that you're doing a good job and working a lot.” (#1027) |
| <i>Personal Understanding of Merit</i> | Content of evaluation | What is being evaluated: work actions or work actions and personal qualities | “So just, I guess to clarify, the content of assessment – it would be a combination of what you bring to the job as well as the relationships you have which would determine whether you get ahead.” (#1013) |
| | Metric of evaluation | How is the evaluation being conducted: quantitatively or qualitatively and quantitatively | “When you are junior, they will make sure you have more quantitative metrics. When you are senior in the organization, there are different metrics ...It's a balance but it is obvious that more qualitative metrics also become more important once you grow.” (#1008) |
| | Unit of evaluation | Who is being evaluated: the individual alone or the individual as part of a team | “Cause like the better relations I build with my coworkers, the better we're gonna be as a unit being evaluated. At least that's my thought process, right? There are many others for whom coworkers are just a means to an end...because for them the unit is just the individual.” (#1306) |
| <i>Refinement of Understanding of Merit</i> | Inclusion of factors | “Ruling in” factors as merit | “Look, we have these great different cultures and different perspectives that we just want to celebrate and want to include when thinking about merit.” (#1011) |
| | Exclusion of factors | “Ruling out” factors as merit | “Talking about sports or something...I thought things like that should be excluded .” (#1011) |

Appendix D: Additional Evidence of Individuals Refining their Understanding of Merit Based on their Early Career Evaluation Experiences

| | Experience Evaluation <i>(Hiring / Promotion / Reward)</i> | Outcome of Evaluation <i>(Positive / Negative)</i> | Refined Understanding of Merit <i>(Inclusion / Exclusion of Factors as Merit)</i> |
|-------|---|---|---|
| #1025 | <p>Hiring evaluation →</p> <p>“So basically, to get the job at [my company], after you complete 4 or 5 rounds of interviews, what they say is like, ‘Alright, here’s what we’re going to do. We’re going to commission the next piece from you. So what we want you to do is pitch us a couple of story ideas. If we like the story idea, we’ll ask you to write the piece on a freelance basis, and we’ll pay you for it. And <u>based on the freelance piece that you write, we’ll decide whether or not to give you an offer.</u>”</p> | <p>Positive outcome →</p> <p>“I don’t know if that’s normal hiring practices, but that’s ... So I basically had to pitch a story idea. Fortunately, they liked it. I wrote up a story and they published it, and then they <u>made me an offer</u> based on the story that I submitted.”</p> | <p><i>Inclusion of work experience</i></p> <p>“Alright, so the sense that I got was, if you were working for [my company] before you were 30 ... it was very likely that you went to Harvard, Yale, Princeton, and were the editor of the school paper or something like that. ... [In contrast], I had at least 10 years of experience before I got to that point. I think a lot of the more senior correspondents, like, they had also spent a lot of years kind of working their way up, and having to really sort of [learn] journalism. ... I don’t want to generalize people, but the <u>good, meritorious journalists had experience.</u>”</p> |
| #1302 | <p>Promotion evaluation →</p> <p>“So, at [my company], we used to do these Myers-Briggs-type things, and we did all kinds of these silly personality assessments, and it was pretty public, meaning when you got your Myers-Briggs or whatever... you would get these little foam bricks that said what you were, like INTJ or whatever ... You put these little foam bricks on your cube wall, and people could walk by and see, ‘Oh, he’s a so-and-so.’ ... And it mattered, even subliminally. I mean, you know, these calibration meetings are all just a group of people talking. It’s not spreadsheets with columns, it’s just, ‘Hey, what do you think about so-and-so? Promoted. Not promoted. Is he a leader? Is he not a leader? Well, he’s got a red brick. <u>I don’t know, looks pretty good.</u>”</p> | <p>Negative outcome →</p> <p>“So the <u>next time we had one of these personality assessments, I lied</u> on all of it and I got the big red brick at the top. Extroverted, driver, leader, blah, blah, blah, and I think, I honestly feel like it made a difference in some <u>people who were very close to me and knew me and were like, ‘You’re not really like that.’ ‘You watch it.’</u>”</p> | <p><i>Exclusion of personality assessment</i></p> <p>“I was like, ‘Hmm, <u>somebody’s paying too much attention to this silliness.</u>’ It’s now a categorization tool or grouping, like it’s some sort of label. It felt to me like that was helping people make decisions, and that there was a preference for a particular mix of extroverted thinking ... There was a particular preference. I could pick up on it. I’d shared ... my opinion of this crap... <u>A merit-based [promotion] should not be ... a personality award.</u>”</p> |

| | | | |
|--------------|---|--|--|
| <p>#1018</p> | <p>Reward evaluation →</p> <p>“Yeah, so, in a bank, the bonus is actually a very big deal. ... If the senior people of your team perform, the bonus, the pool of the bonus, will get bigger for your team, right? Because let's say this is the whole pool, the bonus allocation for the whole firm. It will get sliced to each particular team. If your team performs, you get a bigger slice than others. The bonus for everyone in the team ... will definitely be different. And determination of the bonus is definitely subjective. ... I'm not really clear on this. But the whole idea is, <u>once the budget of your team is decided, I think the manager, the top manager of the team, actually decides how much will be allocated to each person in a team.</u>”</p> | <p><i>Positive outcome</i> →</p> <p>“Our team did pretty well. [chuckle]. ... In my team, I would say that the <u>majority of the people like me were pretty satisfied with what they got.</u> ... As you know, I think investment banking requires a lot of long hours. So a lot of junior bankers tend to burn out. ... and that's not gonna be good for the whole team. [But that didn't happen] ... Part of the reason is we had top-quality people in the team.”</p> | <p><i>Inclusion of individual hours worked</i></p> <p>“If you compare between junior bankers with junior bankers, the guy who works longest hours should definitely have more probability of getting a higher bonus than people who work fewer hours. It's just because since they work a lot more and they have more training on themselves and they can get more efficient going forward. And that's how they can get their productivity. And once you have that productivity, you can get staffed on so many projects and you just increase the likelihood of being in a very good project that generates a lot of revenue for the firm. So I think there are a <u>few factors for junior bankers' merit, like, if you are hard-working and efficient</u> ... And that's what you need as a junior banker.”</p> |
| <p>#1030</p> | <p>Promotion evaluation →</p> <p>“<u>For promotions, we actually had an annual performance review</u> and we needed to write where we thought our successes were: what we'd accomplished, what we want to focus on in the future. Our area manager would look at it, and the brewmaster would look at it as well and make changes. ... Based on my performance review and how the meeting with my manager and his manager as well ... one of the things they asked was, ‘You think you want to move somewhere else?’”</p> | <p><i>Negative outcome</i> →</p> <p>“They kind of wanted to move me to IT. And I kind of pushed back and said, ‘<u>Well, that's not what I want to do.</u>’ I've done this packaging-maintenance thing for a while but, you know, I kind of got tired of it ... [They said,] ‘So why don't you give this IT role a chance?’ So there was no management [in the role], back to being more of a process engineer and network administrator, that kind of work.... The work was challenging initially, but then after a while it became a little bit monotonous, [with] ... silly stuff—not silly stuff, but routine stuff, where ‘I turn on my computer today and my desktop is not working’ or ‘I have this icon on my screen that I can't get rid of.’ ... That is not fun stuff to do.”</p> | <p><i>Exclusion of subjective evaluation</i></p> <p>“I felt it was not the right move. And that was just one of those unfortunate circumstances where I think there was a mismatch between where they thought my strengths were, where they thought I'd be a good fit, whereas where I wanted to go. ... both the brewmaster and the area manager there paid careful attention, ... They made some mental notes ... They were tracking the merit ... <u>But for me, I felt like it was somewhat subjective, because I couldn't think of what concrete quantitative objectives they were really measuring me on ... And that was always somewhat confusing and baffling ... and not merit?</u> Not to be bitter at all ... [but] you have to recognize where there is going to be some favoritism shown to people.”</p> |