



## PROPOSAL

### SSP 2014/2015-002

#### **I. Title:**

Recommendations for Modifications to the Existing IPP System

#### **II. Sponsorship:**

Senator Breslin, Senator Curtis, Senator Gillmore, Senator Renteria, Senator Shortt, Senator Watley, Senator Wullstein, Senator Young

#### **III. Background:**

At the Staff Senate meeting on July 1, 2014, Dr. Chrusciel suggested that a senate sub-committee look at replacing the IPP (Individualized Performance Plan). He would like the committee to look at other alternatives and the new IPP could be as simple as getting rid of IPPs altogether. However, he said he would leave it up to the task force/committee. On Sept 2, 2014 Diane Feinberg submitted a bill to the Staff Senate to address this issue. Senator Kitsmiller moved to commit the bill "Examine the current IPP system and look at other ways to review an employee's performance." The motion was adopted after debate, and the issue was assigned to the Personnel Policies and Compensation Committee as SSP 2014/2015-002.

The Personnel Policies and Compensation Committee of the Staff Senate began meeting in October and has been meeting since to review the current IPP and evaluate different types of performance evaluation processes. The Committee members did research on performance review systems and discussed their personal experiences with other systems used in the public and private sectors.

The Committee enlisted the assistance of Diane Feinberg and Carrie Irwin in understanding the theory behind the current IPP practices as well as the upgrade that is currently happening with the PeopleAdmin system. After weighing the advantages and disadvantages of switching systems altogether, the Committee has decided to instead provide recommendations for content we believe should be incorporated into any human resource administration software we choose as a University.

Much discussion happened around the current IPP system, including both the theory behind it and its use at UCO. The Committee understands the theory behind providing professional development and growth for the employee; however, the theory does not translate to practice. Development goals for the year directly linked to the work

We are aware that HR is working on creating career paths using a ladder system (i.e., Job Title I, Job Title II, and Job Title III). The performance evaluation can be used as a tool to ensure employees have the skills and knowledge needed for their current positions and progressively prepare employees for the next step in their careers. The current IPP system is viewed by most as tedious and burdensome because it is currently a process that is isolated from other processes. The Committee discussed that linking the performance review to improve work performance and provide professional development opportunities will provide greater use of the system by employees and supervisors.

#### **IV. Objective:**

Currently, the IPP system has a strong focus on professional development. As Carrie Irwin explained to the Committee, this focus is constantly reflected in our answers to the Best Colleges to Work For survey and is one of the reasons employees enjoy working at UCO. The Committee agrees that this is a strength.

To amplify this strength, the Committee recommends expanding the objective of the performance evaluation to incorporate an *evaluation of the employee's job performance* as well as an *employee work environment evaluation* in addition to setting and evaluating *professional development opportunities* for employee growth. Therefore, the Personnel Policies and Compensation Committee recommends that any performance review solution that UCO uses in the future be comprised of the following sections:

- a) A section where supervisors can evaluate the work performance of their employees based on job descriptions;
- b) A section that allows the employees to provide feedback to supervisors and the UCO Administration regarding work environment, resources, and support that are provided to perform job duties;
- c) A section that allows for professional development goals, training opportunities, and career progression; and
- d) A section that allows for review of institutional culture (Transformative Learning and the Central Six) and employee relation to the culture.

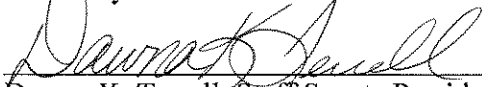
The Committee has developed a form that includes the sections listed above (see Appendix A). The Employee Evaluation and Workplace Environment Feedback sections are based on the book *The Elements of Great Managing* by Rodd Wagner and James K. Harter. The Center for eLearning and Customized Education has been piloting this system quarterly since July, 2014.

4. The **Institutional Culture** section provides employees and supervisors an opportunity to document the employees' activities that support UCO's institutional culture by documenting the following items:
  - a. Transformative Learning
  - b. The Central Six Tenets

Finally, we recommend providing a **Flexible Schedule Option** which offers flexibility for supervisors to perform reviews quarterly, semi-annually, or annually.

Appendix A provides an example of the proposed sections with specific questions.

Passed by consent of the UCO Staff Senate on this 7<sup>th</sup> day of April, 2015.

  
\_\_\_\_\_  
Dawna K. Terrell, Staff Senate President

## Appendix A

### 4. DEPENDABILITY

Ability to Do Job Well With Minimum Supervision

- 3) Plans and performs work in an exceptional manner; little or no supervision needed; always reliable
- 2) Plans and carries out work well; some supervision needed; reliable
- 1) Always waits to be directed; requires close supervision

### 5. COOPERATION

Ability and Willingness to Work with Others for the Best Interests of All Concerned; Willingness to Accept Other Assignments; Ability to be Flexible in Various Jobs

- 3) Exceptionally cooperative; goes out of way to help others; a strong positive force in contributing to positive employee morale
- 2) Cooperates willingly; tactful; good team worker; congenial and helpful
- 1) Difficult to work with; causes friction

### 6. JUDGEMENT

Ability to Think Intelligently and Make Decisions Logically

- 3) Thinks quickly and logically; applies sound judgment; decisions based on thorough analysis; a problem solver
- 2) Thinks systematically; dependable judgment on matters of routine nature
- 1) Jumps to conclusions; makes decisions on matters which should be referred to supervisor

### 7. ABILITY TO LEARN NEW SKILLS

Ability to Learn Work, Retain What Is Learned, and Follow Instructions with Ease

- 3) Exceptionally quick learner; able to apply new knowledge with ease
- 2) Requires average amount of instruction for satisfactory work; retains instructions
- 1) Requires a great deal of instruction, follow-up and supervision

## Appendix A

### 11. COMMUNICATION

Ability to Understand Written/Oral Information And Describe Thoughts, Feelings, and Actions

- 3) Demonstrates excellent communication skills; quickly understands written and oral instructions/information; expresses thoughts and feelings; able to describe situations and actions
- 2) Able to communicate satisfactorily; usually understands written/oral information/instructions; exchange ideas through speech and writing whenever necessary
- 1) Does not understand written/oral information or instructions; does not exchange ideas

### 12. TOTAL CUSTOMER SATISFACTION

- 3) Consistently provides quality customer service that exceeds expectations
- 2) Provides customer service that meets basic needs and expectations; responds positively to feedback
- 1) Does not satisfy customers by providing service that meets customer satisfaction

## Appendix A

### 4. STAFF DEVELOPMENT

#### Training; Resources; Conferences

- 3) I am provided with and directed to a variety of opportunities for personal growth to include but not limited to online training; published resources, external conferences, and team building opportunities.
- 2) I am provided with opportunities for personal growth to include but not limited to online training; published resources, external conferences, and team building opportunities.
- 1) I am provided with limited and/or inadequate opportunities for personal growth to excel in my job.

### 5. OPEN COMMUNICATION

#### Ideas; Contributions; Feedback

- 3) My opinion is highly valued. I am consistently able to share {initiate} my knowledge and technical ability to impact projects in my workplace both with my coworkers and the leadership team.
- 2) While I feel my opinion is valued, I wait until my opinion is requested. I am occasionally asked to share my knowledge and technical ability to impact projects in my workplace both with my coworkers and the leadership team.
- 1) My opinion is not valued; I am seldom able to share my knowledge and technical ability to impact projects in my workplace.

### 6. INTERPERSONAL RELATIONS

#### Ability and Willingness to Work with Others for the Best Interests of All Concerned

- 3) My coworkers are exceptionally cooperative and helpful; there is a strong positive force that contributes to positive employee morale; the workplace environment genuinely promotes professional relationships.
- 2) My coworkers are generally cooperative and helpful; there is most often positive employee morale; the workplace environment strives to promote professional relationships.
- 1) My coworkers are seldom cooperative and helpful; there is most often negative employee morale; the workplace environment does not promote professional relationships.

## Appendix A

### Section 3: Professional Development

#### 1. CAREER PROGRESSION

Current Title and Skills that Need to Be Developed for Improved Employee Performance and Acquire Skills for Next Level of Employee Track

Current Title: \_\_\_\_\_

Skills Needed for Current track: (Link to HR job description for knowledge of additional duties to be performed by next position)

#### 2. GOALS AND OBJECTIVES FOR PROFESSIONAL GROWTH

List at Least One Professional Development Goal/Objective that Will Help You Achieve the Skills Needed for Professional Growth

SMART Goal/Objective 1: \_\_\_\_\_

Action Steps: \_\_\_\_\_

Measurement: \_\_\_\_\_

Date completed: \_\_\_\_\_

SMART Goal/Objective 2: \_\_\_\_\_

Action Steps: \_\_\_\_\_

Measurement: \_\_\_\_\_

Date completed: \_\_\_\_\_

## Appendix A

### Section 4: Institutional Culture

#### 1. TRANSFORMATIVE LEARNING AND THE CENTRAL SIX

Discuss How the Employee Aligns their Job Performance to UCO's Values.

##### TRANSFORMATIVE LEARNING

Accepts and appreciates the Transformative Learning philosophy by participating in professional development activities that place the employee at the center of their own active and reflective learning experience.

Yes, employee engages in TL

##### DISCIPLINE KNOWLEDGE

Approaches job in a professional manner. Possesses and uses skills and information required for position; learns new skills when needed. Knows clearly the functions of his/her unit/department and other related units and departments.

Yes, employee engages in Tenet

##### LEADERSHIP

Expresses ideas and information clearly in both oral and written form. Demonstrates good listening skills. Refers to the appropriate person when unable to resolve issues. Serves as a role model for other employees. Works beyond normal expectations when workload and deadlines require it.

Yes, employee engages in Tenet

##### RESEARCH, CREATIVE, AND SCHOLARLY ACTIVITY (PROBLEM SOLVING)

Anticipates, identifies and clearly defines problems, evaluates and weighs alternatives. Independently seeks appropriate knowledge necessary to complete assigned tasks and/or assist students, staff, faculty, or visitors. Initiates and follows through with tasks and assignments, both routine and new. Seeks and incorporates the ideas of others.

Yes, employee engages in Tenet



## Appendix A

OVERALL RATING (Select one)

Total Possible Points = XX

3) Outstanding (XX-XX pts)

2) Satisfactory (XX-XX pts)

1) Unsatisfactory (XX pts & below)

Overall Comments

COMMENTS ON STRENGTHS AND ACCOMPLISHMENTS:

COMMENTS ON AREAS REQUIRING IMPROVEMENT:

SPECIAL INTEREST AREA(S)/ADDITIONAL TRAINING: