

Welcome

All AP Meeting
AP Association
June 20, 2018

AP Association Charge

The AP Association advocates on behalf of administrative professionals in discussions with the University administration related to wages, benefits and working conditions.

2017-2018 Executive Committee

Tricia Westergaard	President
Marie VanBuskirk	President-elect
Sara Webb	Past President
Nancy Osmialowski	Secretary
Patrycja Comello	Treasurer
Kelly Gianetto	Representative Bands J-R
Stephanie Lee	Representative Bands J-R
Don Ritenburgh	Representative Bands J-R
April Thomas-Powell	Representative Bands J-R
Maria Ebner-Smith	Representative Bands S-X
Greg Jordan	Representative Bands S-X
Kelly Brault	Member at Large
Anthony Gallina	Member at Large

Incoming AP Leaders

AP Association

- President-elect
 - April Thomas-Powell
- Secretary
 - Nancy Osmialowski
- Representative Bands J-R
 - Don Ritenburgh
 - Kristin Rohrbeck
- Representative Bands S-X
 - Jean Szura
- Member at Large
 - Andrea Mill

Year in Review

- Representation on behalf of APs:
 - Monthly meetings with Ron Watson, AVP Human Resources
- Consulted with Administration:
 - Performance Management Focus Groups – updates on process and feedback
- Tuition Assistance changes approved at June 4 board meeting
 - Eliminate the limitation of eight credit hours per semester and 16 credit hours per fiscal year.

Year in Review

- AP Association Updates:
 - Scanning/archiving decades of AP Association history/documents
- Collaboration with AP Assembly:
 - Two meetings with both Executive Committees
 - Two meetings with Dr. Pescovitz
 - Co-hosted table at OU Benefit Fair
 - AP Association updates in AP Assembly newsletter
- Assisted APs with questions and concerns

Next Year

- AP Award Structure Review started by E-Board
- Alternate Work Schedule Committee
- Updating AP manual

Treasurer's Annual Report

- The AP Association holds funds in two accounts.
 - University Account: \$3,255.78
 - OU Credit Union Account: \$3,182.94
- The AP Association does not currently have a revenue stream, as we no longer collect dues.

Human Resources Update

AP Association

June 20, 2018

Human Resources Agenda

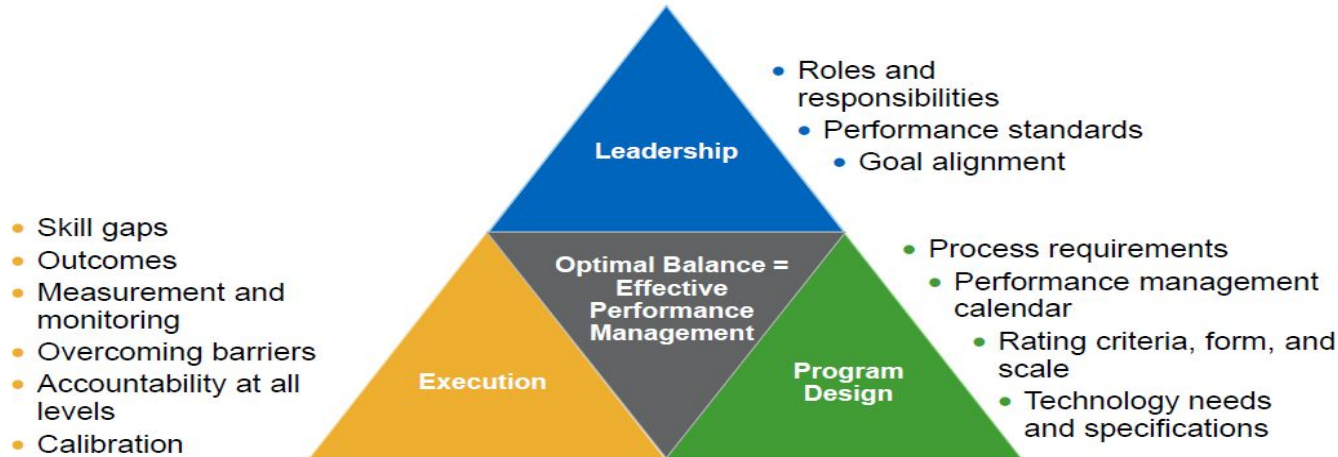


- Intro and UHR Update - *Ron Watson*
- Compensation Updates – *Eric Herppich*
- Performance Management – *Willie Dorsey*
- Wrap Up – *Scott Kunselman*

Executive Summary

Performance Management – A Balanced Design Effort

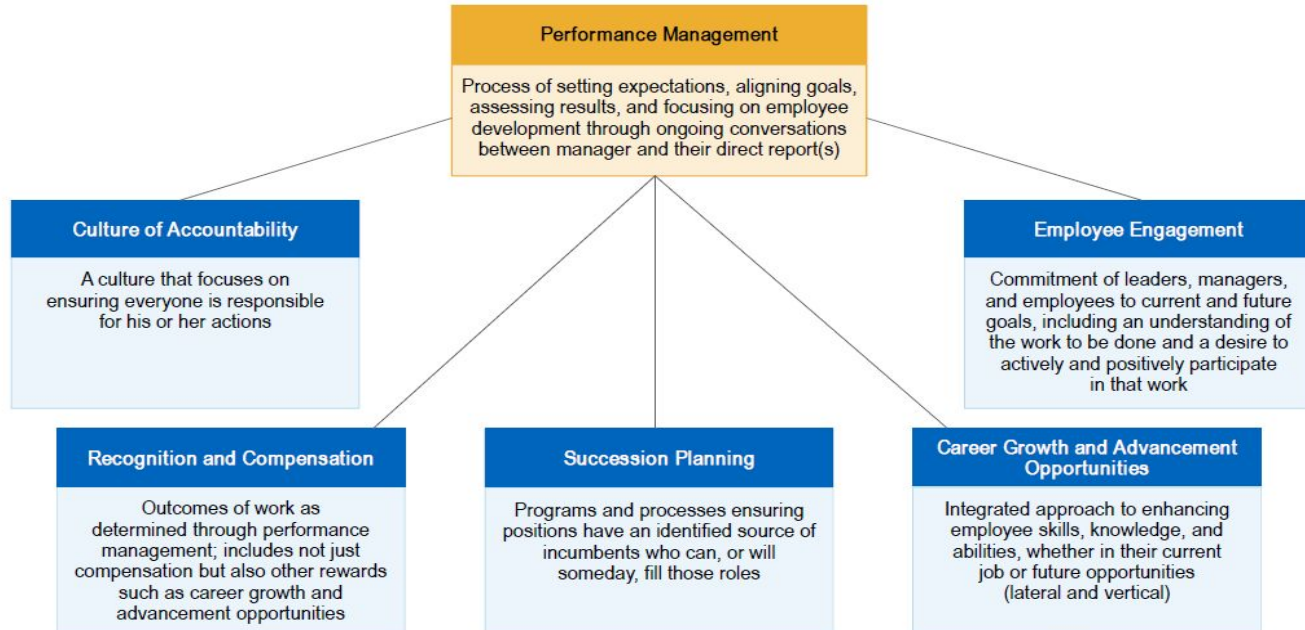
- The following framework, which Sibson used to understand and assess the University's current state, represents the three key aspects of effective performance management
- Future redesign efforts should equally emphasize each area to truly drive effective performance management



Executive Summary

The Value of Performance Management

Performance management is linked to many integrated programs and processes used to source, attract, select, train, develop, retain, promote, and engage employees at all levels



Leadership *Overview*



Focus Group Perceptions

- Leadership is working hard to improve the program by gathering diverse feedback and perspectives
- The current program is lacking unified leadership commitment and is not a good cultural fit for Oakland
 - There is a need for greater accountability at the leadership level for the program's success
 - Cabinet should be champions of the program, set accurate expectations, send consistent messages, and hold their divisions accountable
 - The program should inspire a culture of development rather than a culture of compliance
 - The program's objective should be to encourage and foster a culture of high performance
 - There are few formal mechanisms to help low-performing staff (e.g., performance improvement plans, mentoring)
- The purpose and standards of performance management are unclear and the ideal future state of the program varies
 - Most focus group participants agree that the program should measure the full value that staff offer to Oakland
 - A handful of participants suggested eliminating the formal performance management program altogether given the lack of buy-in and meaningful outcomes of the current program

Leadership

Performance Standards and Goal Alignment



Focus Group Perceptions

- There is a need for improved alignment between University, department/team, and individual goals
 - While some feel that they understand and are aligned with the goals of their division and the University as whole, this was not consistent across the focus group participants
 - This is most likely due to the fact that some divisions do a better job than others at developing and communicating overall goals and objectives that can then cascade down to the individual-level
 - Greater communication from the top is necessary in order for staff to set their goals in support of the University and their division's strategic objectives
 - Staff value more line-of-sight in how their individual goals contribute to meeting the University's goals
- There is some confusion on the definition and focus of performance goals and standards
 - Some believe goals should focus on job responsibilities while others believe goals should focus on personal and/or professional development
 - This leads to inconsistencies in goal-setting (e.g., related to job or not) and the degree of stretch in those goals
 - There was general agreement that goals should be achievable; however, the sense is that some goals today are not realistic and others are too easy
 - Many felt that a focus on goals was too narrow a view; for some jobs, daily responsibilities are a key driver; for many, incorporating competencies would also be helpful

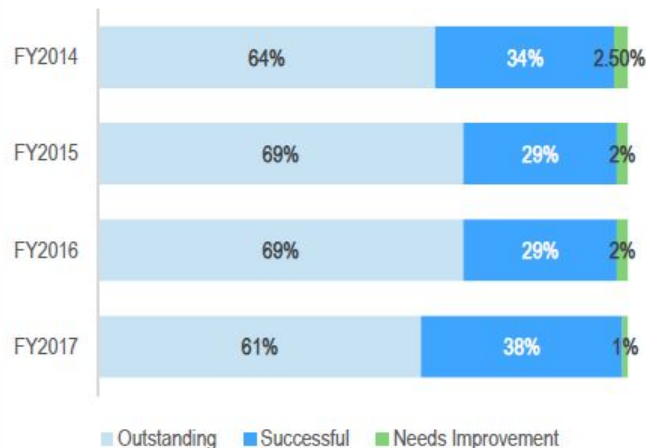
Program Design *Structure and Rating Criteria*



Focus Group Perceptions

- There is concern that the current structure of the program (1) does not measure all aspects of performance and (2) is too rigid to account for the different types of jobs and roles within the University
 - There is disagreement on whether staff should be rated on performance of their job duties or achievement of their annual goals
 - Some participants felt competencies, skills, and engagement levels should be assessed through performance management as well as staff's fit within their position and the University
- There is a desire for greater understanding of the definitions and implications of the ratings and how they relate to compensation decisions
 - There is frustration that a rating is "meaningless" and creates more trouble than it is worth
 - Many participants would support getting rid of ratings in the current environment
 - Managers are reluctant to give poor ratings as it might limit compensation increases

Performance Ratings Distribution History¹



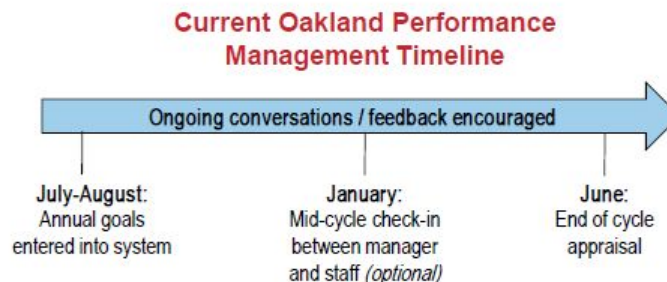
Program Design

Calendar, Technology, and Process



Focus Group Perceptions

- An overall strength of the current program is the timeline's alignment with the academic and fiscal year, which makes it easier to set and track goals
- Some staff would like to include a formal, yet simple, mid-year check-in in January
- While virtually all participants agree that having an electronic performance management system is effective, the current system is cumbersome and not intuitive
- There is a broad desire for greater flexibility throughout the year; for example, staff are required to set three to five goals at the beginning of the cycle but feel unable to modify those goals as priorities shift throughout the year



Execution *Accountability*

Execution

Focus Group Perceptions

- Two-way accountability is needed between managers and staff
 - Goals should be set together and mutually determined if the staff member has the resources and tools needed to perform their job well and achieve goals
 - Managers should be held accountable for ongoing conversations with staff and for managing the process; some wanted to incorporate this into managers' formal job responsibilities
 - "Bottom-up" management: Some staff drive the process, including scheduling check-ins and evaluation meetings, and drafting all materials for their managers
 - Ongoing conversations will ensure that there are no surprises at the end of the cycle
 - There is also value in staff having ownership in the process (e.g., draft goals and complete self-evaluations)
- Some staff do not have confidence that their managers understand their jobs and therefore, cannot accurately provide performance feedback
 - There is a sense that some job descriptions are outdated and do not reflect jobs as they exist today
 - Job descriptions are difficult to update, even though they are supposed to be reviewed during the annual performance management process
 - There is no clear agreement on who should be accountable for making sure job descriptions are up-to-date (e.g., managers, staff, HR)

Execution *Outcomes*

Execution

Focus Group Perceptions

- Many feel the current process is time consuming with little impact or meaningful outcomes, especially in regards to compensation
 - There should be a clear understanding of what is received if staff achieve goals and/or receive a high performance rating (or vice versa)
 - Ideally, performance below expectations should be tied to clear development plans and dedicated resources to improve performance
- Some participants mentioned tying recognition vehicles to performance (e.g., parking spaces)
- Outcomes of the current performance management program are not clearly linked to broader human capital/talent management programs, such as:
 - Professional development
 - Mentorship program
 - Competency/skill assessment
 - Career pathways/growth opportunities
 - Succession planning
 - Workforce planning
 - Retention

Execution *Linkage to Compensation*

Focus Group Perceptions

- The connection between performance and merit increases is perceived as poor to nonexistent, and many participants expressed a strong desire to break the tie between performance ratings and salary increases
 - Some feel that there is virtually no linkage between performance and compensation even now given the small degree of differentiation
 - Some suggested imposing a bell-shape distribution to better differentiate performance and distribute more meaningful performance-based increases
 - Staff are not motivated to work towards goals because the difference in pay is not viewed as significant
- Many staff who receive a high-performance rating view their increase as an “across-the-board” adjustment, diminishing the perceived value of recognition
- The link can negatively affect managers’ perspectives and limit honest, constructive feedback to avoid having a lasting, negative affect on a staff member’s salary
- There are mixed reactions to giving division leadership a budget to distribute based on performance in their area

Oakland Salary Increase History¹

	FY12	FY13	FY14	FY15	FY16	FY17	FY18
Increase Budget (%)	3.00	2.25	2.30	2.30	2.50	2.50	2.00
No Increases						x	
Across The Board	x	x	x				
Salary Increases Based on Performance				x	x		
2.0% added to base or one-time lump sum based on Compa-Ratio							x

Execution *Calibration and Training*

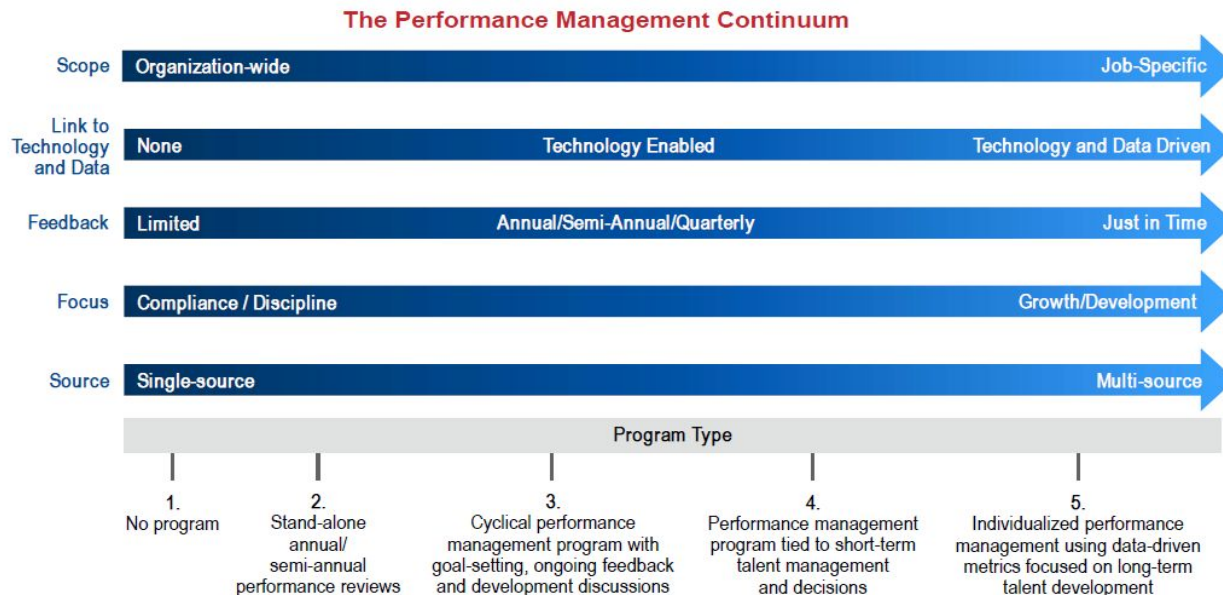
Execution

Focus Group Perceptions

- Inconsistencies in execution exist by manager
 - Differences in manager and staff physical locations and/or classifications can exacerbate inconsistencies; faculty (e.g., Deans or Chairs) who supervise AP staff have a particularly difficult time with the process
 - The process of goal-setting differs by department, and even by manager
 - It seems that many managers and staff have ongoing conversations throughout the year; however, this is not consistent
 - Some managers and staff do not meet, even at year-end review, relying on electronic tools and communication to complete the process
- There is no formal, cross-functional calibration of goals or performance across the University leading to inconsistencies across and within divisions
- Those who have attended performance management training programs found it useful and have seen improvement in recent years; however, there is a broad desire to increase training and make portions, if not all, training mandatory
 - Participants feel ongoing, focused training for both staff and managers would be valuable
 - There is a need for additional and specific training, tools, and resources (especially for managers) to effectively manage the process and provide proper feedback
 - Many participants want more direction and guidelines that would leave less up to interpretation

Performance Management

Executive Summary *The Performance Management Continuum*



The goal is to have a program that makes a *meaningful* difference to employees and the organization. True change in performance management takes time, often several years, as it requires a cultural shift in the mindset of staff, managers, and leaders.

Performance Management Practices

Keys to Successful Performance Management

Enduring Keys to Successful Performance Management

- Executive support and modeling
- Program simplicity
- Balanced, but focused, perspective on performance
- Manager skills and commitment
- Communication
- Training
- Frequency
- Technology enablement
- Calibration
- Outcomes measurement
- Alignment with talent management programs

Key Factors for Successful Change Management

- Leadership from the business and human resources
- Widespread involvement of stakeholders in the design
- Clear strategy based on business need
- Training of employees and managers
- Use of performance-oriented success metrics

Successfully transforming performance management systems relies on utilizing the keys to successful change management.

FY19 PERFORMANCE MANAGEMENT

- Temporarily suspending formal performance rating system
 - Needs Improvement
- Across –the board compensation increase
- Development Conversations
- Three to five measurable goals
 - One tied to Institutional Goals outlined in our Strategic Plan

Beyond FY 2018 Performance Management



- Ensure that the job descriptions, duties and expectations for which employees are recruited, hired and held accountable accurately reflect the work they are being asked to complete;
- Establish a system of performance accountability that is consistent across the many employee groups and work environments here at Oakland;
- Ensure that supervisors are well prepared to deliver fair and proactive performance evaluations;
- Identify effective ways to incorporate merit-based increases for exceptional employees in the future;
- Train supervisors to more effectively identify and nurture the development of their top performers;
- Improve and expand professional development opportunities for all staff, and do so in the well-established and effectively communicated context of advancement opportunities this professional development will make possible



Thank you for coming!
Thank you to the AP Assembly for
sponsoring Dessert
Thank you to Kelly, Anthony and Don for
planning this event!

Visit the AP Association website for
up-to-date information
and a copy of today's presentation.

oakland.edu/APassociation