

**HR CONTACTS MEETING NOTES**  
**1/25/17**

**LINDA THAI SCHLOSSMAN – UPDATES**

EVC Area HR News

- Academic Town Hall for EVC Area Employees – Performance Appraisal Redesign Project (Policy Covered Employees) to be held [Tuesday, January 31<sup>st</sup>, 1:30 – 2:30pm in The Forum, Price Center East](#)
- EVC Office has new employee: Helen Mout to assist with Training Programs
- Relaunching [U-Explore Program](#)
- EVC - [People Management Certificate](#) available through Staff Ed/UC Learning
- New Staff Advisor to the Regents position is now available – **deadline is March 10**
- More info as to how to become next [Staff Advisor to the Regents](#) is available (see link).
- Reach out to [Lawana Richmond](#) ([lrichmond@ucsd.edu](mailto:lrichmond@ucsd.edu)) (858) 534-2507 if you are interested.
- **Deadlines** for transition assistance program (**TAP**) for employees affected by [FLSA](#) changes.
  - Feb 13<sup>th</sup> for biweekly for pay on Feb 22
  - Feb 17<sup>th</sup> for Monthly for pay on 3/1
  - Feb 24<sup>th</sup> for Biweekly for pay on 3/8
  - [Form](#) available on Blink

**JOANNE TOLBERT-WELLS – PREVIEW OF NEW PERFORMANCE APPRAISAL REDESIGN SYSTEM**

- [Joanne Tolbert-Wells](#) started at UCSD on June 1<sup>st</sup>, 2016 – and was assigned the re-design of the performance appraisal system.
- She surveyed campus and received responses via [Idea Wave](#) for how to improve the system.
- Policy Covered staff only at this point.
- People wanted electronic process, consistent standards, link to IDP, coaching sessions, merit based performance appraisal system, upward appraisal of supervisors
- She surveyed departments/polls/wish lists/the process/

**Findings:**

- Overall dissatisfaction with rating scale,
  - Want more meaningful measurements
  - Ease of administration
  - Frequency with which appraisals are conducted
  - More often than one year
  - No surprises
  - Two way process – staff wanted input into supervisors to be held more accountable
  - Supervisory training, coaching, rated fairly and accurately
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- **Goal is to create one tool for all VC areas**
  - She utilized 3 teams: Thought Leadership Team, Steering Committee, Workgroup and Implementation Teams

### **Why are we doing this?**

- Campus asking for simpler tool
- Departments are asking for more flexible appraisal cycles
- HR – consistency, tracking and monitoring across organization
- Supervisors - training and coaching in how to evaluate and communicate in a merit pay environment
- Employees – meaningful and frequent feedback and opportunity to document/recall accomplishments that occur throughout the year

### **Research Indicators**

- Should use some form of rankings or ratings
- clear definitions
- combine use of competencies and goal accomplishment criteria
- keep it simple – 5 competencies, 3 pages optimal
- engage in mutual goal setting with identified measures of success
- conduct semi-annual or quarterly review or conversations
- provide honest, constructive, frequent feedback
- offer ongoing supervisory training and coaching
- calibration – clearly identify how pay will be tied to the performance standards
- technology enablement
- no magic formula- do what works best for your organizational culture, mission and goals
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### **Current State – Models we use:**

5 standards, 12 competencies – we use several models – goal is to go to one tool.

DISSATISFACTION WITH RATING SCALE – eliminate current ratings scale and definitions; replace with performance descriptors or levels as follows:

### **5 ratings:**

- Outstanding achievement (approval process TBD)
- Achieved more than expected
- Fully achieved expected results/expectations
- Partially achieved expected results/expectations (no increased compensation)
- Did not achieve expected results/expectations (no increased compensation)

### **NEW RATING NOTES:**

- For “outstanding” rating, there will be a higher level of accountability for supervisor – must provide examples of outstanding performance and it will need to be reviewed/approved at next level up, since there is a monetary compensation. Supervisor recommends and must be approved.
- What supervisors is able to do on their own is going to be monitored/reviewed/approved, especially if it has to do with additional compensation.
- Wants to make sure if additional compensation is given that it is completely justified.
- Want to make it meaningful AND accurate.
- People who got “exceeds” consistently may not get this
- Campus-wide, only policy covered, not health sciences (they are joining the Medical Sciences)

- Next level approval – not sure what that means – questions still unanswered – not sure what approval process will be.

**New process will go into effect in 2018.**

- There will be training, testing, and a chance to review before implementation.
- Definitions associated with competencies and standards will not be completed until end of the month.
- Finalized rating scales or measures not until end of month or beginning of march
- Academic Affairs is the **only VC area** that is getting this preview (no one else across campus is getting this preview)

**NEW FORM –**

- use of job functions
- use of goals for positions that area primarily goal driven
- use of current five performance standards (reframed as CORE VALUES):
- PRINCIPLES OF COMMUNITY (TO INCLUDE DIVERSITY AND INCLUSION)
- HEALTH & SAFETY
- CUSTOMER SERVICE
- SUPERVISION (TO INCLUDE SUPERVISORY/MANAGEMENT COMPETENCIES – TBD)
- Achievement rating should be “as evidenced by...” and supervisor will type in
- Supervision components (were 4, now 7)
- Leadership, performance management, organizational accountability, resource management and planning

**NOTE that IDP is different from Performance Appraisal**

- IDP – is a development conversation, should not be part of how an employee is evaluated – goals for learning, growth, should be separate and apart from performance appraisal – how did I perform my job?

**QUESTION: HOW ABOUT STRETCH GOALS?**

- Sometimes stretch goals are not part of the current job – if they add to what current job is, then they can be awarded for it. So, you do have some mechanism to recognize going above and beyond.

**EASE OF ADMINISTRATION:**

Survey results showed request for more than one cycle: May 1 – April 30 came back as #1 answer

Will continue to offer the current cycle – but Joanne has asked to see if we can offer one more option..

Take electronic tool and build upon it

- must be integrated with current UCSD system
- way too expensive to go outside current system
- may need to integrate with PeopleSoft, E-Performance for reporting purposes
- must be able to track, monitor and indicate where each appraisal is in process and overall compliance

- should be able to store documentation of informal performance conversations leading up to annual formal appraisal submission
- may use paper tool in initial rollout if unable to automate by 2017 deadline.
- Quarterly performance conversations are not required, by supervisors will be asked to do so.
- Two way review system – not in the scope at this time? phase 2
- supervisory training coaching
- IT resources
- change management
- employees will have opportunity to play with tool before it going live

### **THREE phases – we're in phase 1**

- phase 2 – look at review feasibility of two way process
- phase 3 review applicability for represented staff

### **WHAT'S NEXT?**

- finalize new metrics
- finalize new structure
- what cycle will be
- further define tool
- define what goes into supervisory content
- look at change management plan
- updates are available on blink as they progress

### **MAIN CHANGES:**

#### **RATING SCALE**

- CYCLES: UNREPRESENTED MAY 1<sup>ST</sup> /REPRESENTED JULY 1<sup>ST</sup> CYCLE WILL REMAIN
- PERFORMANCE STANDARDS – CHANGE DEFINITIONS – WHAT DO THEY NEED

### **Going to start looking at incentives:**

- One thing they'll look at is "flex-scheduling"
- Certain positions might be more conducive to a remote
- Reduce campus footprint by having people work from home
- Reduce office space needs
- Take one office and have 5 people share if they come to campus one day per week
- Office space is at a premium – expensive proposition
- 30 percent can work from home and do job well is her guess
- Biggest challenge is being able to supervise people they can't see
- How do you know your employees are working?
- Some deliverable/evidence of their ability to do their job
- Key in managing a workforce is to manage the work instead of the behavior
- Reduce campus footprint – campus construction will become more of a nightmare than it is right now...

**FLEX scheduling:**

- How soon looking at flex scheduling? Right now – You'll be hearing from Joanne soon...
- Keep in mind areas in your department you think would be appropriate (i.e. which areas could perform work from home?)
- Work from home 2-3 days/week?
- Pierre Oulet is definitely on this page. It will come on high.
- Faculty may push back...how to get them accustomed?
- Looking at service level expectations?
- Responding to email within a two hour time period.