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## HR Consultant-Journey, OUTREACH INITIATIVE

Each Consultant will perform at least two customized presentations (30-60 min) for supervisors and/or employees in their assigned areas, based on needs for those areas determined by the Consultant in discussion with the Director, with School/Division HR staff, and/or from direct experiences with the School/Division/Department in order to increase visibility, awareness, and understanding of employee relations policy and best practices so that employees and supervisors can have clean and proper communication regarding performance expectations.

- Due prior to end of performance cycle (March 31, 2017). The two presentations may have the same content. Consultants can develop the materials independently, in conjunction with other E&MR/OHR staff, or modify existing materials.
- The preferred audiences are management teams, employee groups, or organization-wide. In some cases, presentation to larger School/Division HR teams may be allowable.
- Presentation feedback will be received from School/Division HR staff, anecdotal information from participants, and direct observation of presentations by the Director and/or other Consultants.

Exceeding expectations may include presenting additional, different programs (different topics/audiences) within this cycle, create significant, new training materials that can be used by other Consultants, consistently and skillfully fielding difficult questions or managing argumentative participants in order to keep the presentation progressing, and/or strategic follow-ups with participants to address specific concerns.

## HR Consultant-Journey, PERFORMANCE MANAGEMENT CONSULTATIONS

Achieve proficiency in new performance management program by June 30, 2016 in order to provide appropriate consultation to supervisors and employees on required and preferred application of processes so that supervisors and employees can benefit from the new program and succeed in meeting or exceeding performance goals.

- Review performance plans / position descriptions to provide useful and appropriate suggestions on applying institutional goals to specific job duties and crafting strategically aligned individual goals.
- Review disciplinary actions to determine which goal(s) will be affected in the appraisal. Selection should be based on the cause of the problem instead of an effect.
- Provide guidance on written overall comments and determining appropriate overall ratings.

Exceeding expectations may include providing ad hoc training throughout the cycle to departments on PM-related topics; regularly using available PM toolkit resources in consultation to guide clients toward self-sufficiency; and/or drafting additional toolkit resources that meet newly-identified needs or that enhance detail/scope of resources.

## HR Consultant-Journey, PROCEDURAL PROJECTS

Complete a procedural guide (generally 5-10 pages) to address at least one recurring employee relations issue, selected from a provided list (example: financial audits, employee deaths, pornography, etc.) in order for consultants to have ready access to relevant information so that our team can be confident in providing consistent, timely, and useful guidance to our constituents.

- First Project to be completed by December 1, 2016; Second Project by March 1, 2017.
- Procedures follow an approved format based on discussion with the Director.

- Procedures address issues such as relevant policies, necessary coordination with other University groups, work flows and process steps, key questions that need to be addressed, and reporting requirements, if applicable.

Exceeding expectations may include explaining (in)frequent variations that may require differing approaches or different severity of discipline; reviewing past related actions in the disciplinary database to evaluate and describe consistency/appropriateness of past actions; providing suggestions for related process improvements; and/or completing additional projects.

## HR Consultant-Journey, SUPERVISORY TRAINING PROGRAM

Each Consultant is responsible for presenting the E&MR component of the training for front-line supervisors in their respective departments in order to provide sufficient guidance to new supervisors so that they can be successful in their supervisory roles. Area teams (health affairs, academic affairs/administration, and F&A) may choose to co-facilitate.

- Timeline will be determined by Training & Development in conjunction with departments.
- Presenters will receive individual evaluations on their presentation and facilitation skills. Consultants are expected to receive at least a 4.0 average (5.0 point scale) from the participant's feedback on presenters.
- Presenters must be able to adhere to the defined presentation and time limits, field general questions from the participants, and facilitate the debrief of the case study practice counseling session to glean best practices, proper decision-making, and appropriate communication styles.
- The Director will also collect anecdotal feedback from participants, department HR staff, and T&D training specialists, as well as from direct observation of presentations.

Exceeding expectations may include assisting in additional sessions due to consultant unavailability, scores averaging higher than 4.5 on participant feedback, skillfully fielding difficult questions, and/or managing argumentative participants in order to keep the class progressing.

## Bldg & Env Services Tech-Advanced, QUALITY ASSURANCE

Score 80-90% on each monthly Team Checklist to ensure consistency in our cleaning practices so that our buildings are clean and safe for our customers. Any issues noted on Team Checklist must be resolved immediately and will be rechecked by the Zone Manager within five business days.

## Bldg & Env Services Tech-Advanced, ATTENDANCE

Adhere to the Facilities Services Attendance Policy and maintain an overall attendance record of 85-90% for the performance cycle to ensure service delivery and fair distribution of work among team members. Attendance averages will be reviewed quarterly with each employee. Absences due to Adverse Weather or Family/Medical Leave will not be included in total absences.

## Bldg & Env Services Tech-Advanced, SAFETY TRAINING

Attend 80-89% of all scheduled safety trainings and receive a passing score on all exit quizzes to ensure your safety knowledge is being maintained so that you are working safely. Missed trainings made up within 30 days of the scheduled date will count toward meeting the expectation.

## Business Services Coordinator-Journey, UNIRESOLVE PHASED IMPLEMENTATION

Achieve proficiency in the Uniersolve ERP prior to the end of the fiscal year so that personnel and financial transactions can be completed efficiently, accurately, and independently for our department's employees.

- Meet the training milestones set by central HR/Payroll/Finance and by the Uniersolve Terms of Use policy. Use available web-based and written documentation as needed in day-to-day transactions.
- Adhere to the new procedures and deadlines established with the new system and the College's revised processing requirements.
- Ensure new and legacy records are organized and maintained consistently and clearly so they are readily accessible and understandable for use by self and others.

Exceeding expectations may include serving as a regular resource to other department staff in learning the system, converting and organizing legacy records in an accessible electronic format, and developing a variety of new, standing, customized reports to meet unique department needs.

## Business Services Coordinator-Journey, CNNS SPONSORED RESEARCH COMMITTEE

Represent the Department on the Dean's CNNS Sponsored Research Committee (October 2016 through February 2017) to ensure the Department's research needs and concerns are clearly voiced and to advocate for additional resources and less administrivia from the College so that our department can meet its research goals.

- Prior to the first meeting, meet with a majority of the research staff and faculty to identify major priorities and concerns. Compile and prioritize the list to present at the September 2016 all-hands meeting for additional comments and buy-in from the department.
- Report-out to the exec committee each month. Minutes from the research committee meetings and your report-outs should show your active involvement in raising our priorities.
- Attending these biweekly meetings and performing related tasks is a priority above other assignments. You must coordinate your work appropriately and keep me informed if there are any potential conflicts in time or critical duties.
- Exceeding expectations may include additional legwork outside the normal committee activities to advocate successfully for department needs, achieving significant improvements to our grant management processes through the Committee, or recognition by peers and the College as a leader and wise proponent of College progress in this area.

## Business Services Coordinator-Journey, TRAIN BACK-UP GRANT TRAINER

Train Gloria Gleeson to be your primary back-up grant trainer so that we have two strong internal resources on grant management and have greater flexibility in providing regular and ad hoc up-to-date training to our research staff and faculty.

- By October 2016, Gloria should have completed the requisite campus training for grant managers. You should discuss the content of each class with her within two days of her completing the class to determine her retention/understanding and adjust training accordingly.
- By November 2016, Gloria should be able to revise and update content for the proposal resource website adhering to the same format and notification expectations you use.
- By December 2016, Gloria should have completed at least two “test drive” presentations with me and a small number of faculty. The second presentation must show any identified improvements determined from the first presentation.
- By February 2017, Gloria should be able to function independently and capably in these duties so that she can conduct at least half of the department trainings scheduled for this spring with at least a 4.0/5.0 overall rating from participants.
- Exceeding expectations may include a significantly earlier completion date or significant advancements in our research training materials resulting from the training process.

## Social & Clinical Research Specialist-Journey, TALENT ACQUISITION

- As part of Phase 2 of the BULL Project (data collection), complete hiring and training of two new well-qualified research assistants prior to September 1, 2016 to ensure the data collection phase can proceed fully-staffed and on-schedule for a December 2017 completion date.
- Hiring actions must comply with University policies and procedures.
- Examples of exceeding expectations may include additional effort in targeted recruitment strategies or completing recruitment and training of new staff before August 1, 2016.

## Social & Clinical Research Specialist-Journey, DATA ENHANCEMENTS

- Complete modifications to C-NOTES database in advance of data collection (preferred deadline: October 1, 2016) so that the database is prepared for data entry in December 2016.
- Table/field structures must be consistent with other C-NOTES projects to allow cross-reporting. • Data report templates must comply with the Director's guidelines (distributed May 2014).
- User guide, FAQs, and training for C-NOTES staff must be completed no later than early November 2017 so that staff are fully prepared for data entry.
- Format and scope of materials should be consistent with the BEAR project guide and include contingency scripting consistent with those used in the Telluride project.

## Social & Clinical Research Specialist-Journey, VISIBILITY

- Present the Telluride research at the CGEG Symposium in July 2016 so that your work and our program receive increased positive visibility within our academic research community.
- Attend at least four of the Dean's monthly luncheons this cycle to increase your positive visibility/networking with other researchers in the College.
- Review C-NOTES contributions to RePEc and present a summary at the fall retreat in November so that determinations can be made at the retreat for best next steps. Schedule several review sessions with me prior to the retreat to go over materials.

## Social & Clinical Research Specialist-Journey, FUNDING & GROWTH

- Work with the CGEG and University development offices to propose at least two marketing strategies for funding outreach before March 31, 2017, with at least one of the strategies directed toward Alumni, so that the department can expand its available funding resources and research support network.
- Submit at least two grant proposals before March 31, 2017 (possible topics and collaboration opportunities to be determined from our ongoing discussions and discussions at the fall retreat in November).

## Social & Clinical Research Specialist-Journey, QUALITY CONTROL

- For areas with a response rates lower than 50%, determine possible causes and execute a strategy for follow-up contacts to bring all completed areas to at least a 50% response rate by February 1, 2017 so that our dataset is more complete for analysis.
- Exceeding expectations may include achieving a 60% return rate or better

## Administrative Support Specialist-Advanced, CUSTOMER SERVICE

Represent the Center professionally at all times to serve as the “face” of the Center in order for our colleagues, clients, and students feel welcomed and attended to so that the Center is viewed positively by our stakeholders.

- Return all phone calls/respond to all messages within 4 business hours
- Check mail daily at 10a and 2p; distribute to appropriate staff members within one hour of receipt
- Ensure rooms and parking are reserved and that visitors have information needed (in terms of direction, parking, etc.) to make visit to the center positive
- Achieve positive feedback of 95% or greater on room reservation/set up process from customer service tickets related to room reservation process
- Maintain professional front office area, cleaning area and removing trash when needed

Exceeding expectations may include significant unsolicited feedback from customers on positive customer service.

## Administrative Support Specialist-Advanced, STANDARD OPERATING PROCEDURE DOCUMENTATION

Create SOPs for duties related to admissions and event planning in order to provide consistency, efficiency, and quality in our administration of these events so that we help to put a “best foot forward” in engaging and attracting top students to the Center.

- Meet with stakeholders involved in admissions process for MA program, determine roles in the process, and identify stress points in the efficient operation of the events (due June 30)
- Establish a short follow-up survey for students to gain feedback on the events for future planning (due July 31); Student ratings of the events should average no less than a 4.0 on a 5-point scale over the course of the year (showing satisfaction with the process and feeling engaged and positively toward the department); The average rating should either maintain or improve over the course of the first year
- Develop concise and clear template emails/itineraries for students interviewing for admission, including checklists for critical points in student recruitment process and a list of vendors / key contact information used for recruitment events (due Aug 31)
- Develop flowchart that provides an overview of the admissions process and who in the Center participates at various points in the process (due Aug 31)
- Implement new procedures by September 1 so that survey data can be collected with each event through the fall and spring semesters

Exceeding expectations may include determining additional processes needing documentation, taking initiative to develop helpful resources and tools, or making useful recommendations to streamline student recruitment process.

## Administrative Support Specialist-Advanced, CREATE FACILITIES TRACKING SYSTEM

As part of your responsibilities to assist with the administration of facilities requests, design a ticketing and tracking system for all facilities requests in order to triage and resolve facilities requests more efficiently and effectively so that our presenters, participants, and colleagues can productively work in a pleasant and conducive environment.

- Work with IT group to create facilities email request system to track work orders
- Log requests in database within one hour of receipt
- Triage requests and respond at least 85% of the time within 2 hours of receipt
- Tracking system should be operational by March 31

Exceeding expectations may include starting phase two of tracking system before end of cycle, which includes working with IT to establish tracking metrics to share with Business Manager in order to better assess facility needs.

## Administrative Support Specialist-Advanced, PEOPLESOFT TRAINING AND PROFICIENCY

Achieve proficiency in new PeopleSoft Finance System by end of performance cycle in order to process actions accurately so that our transactions are compliant with University policy.

- Attend required trainings necessary to obtain system access
- Attain 80% accuracy/approval of actions from central finance within 24 hours of submission without actions being returned due to user error or being incomplete
- Create FAQs related to system access/processing of transactions

Exceeding expectations may include obtaining mastery of system and providing assistance to other users in the department on finance/admin functions as needed.