FUNCTIONAL DEVELOPMENT
FOR HR LIAISONS

Human Resources & Organizational Effectiveness

February 26, 2020
Brief Recap
Key Needs Assessment Themes

Most of the themes were consistent regardless of population demographic, even across the different system members.

While there were many themes, the top themes in no particular order:

• Longer-term outlook and progressive development – for similar roles and leadership
• Development and consistent development of similar functional roles versus sink or swim/ trial and error
• Better prepare supervisors, managers, and leaders to be supervisors, managers, and leaders – this came from all levels (front-line staff, faculty, and supervisors / leaders themselves)
• Working with, networking with, and learning from others across the university, especially those in supervisory / manager roles and similar functional roles in different colleges and divisions.
• Specific competencies (e.g., self-awareness, adapting style, conflict, budgeting, project management, change management).
• Specific development activities (e.g., networking events, 360 feedback, coaching for supervisors, managers, and leaders)
• Better Workday training and learning & support materials
• Longer duration, more fit for purpose, and more integrated on-boarding / orientation with functional development and colleges / divisions
Our Future Direction

Align the university’s competency development with recommended and benchmark practices in the Learning and Organization Development field

More focused on a holistic, systems thinking approach with:

• Programs and services aligned to key functions and roles of the University
• Longer-term outlook and progressive development (leadership and functional)
• Helping people learn, practice, and easily access and reference what they need to know and do for their job
• Expanding Learning Technology (eLearning), Evaluation and Organization Development efforts
Overall Shaping Plan

**FY19**
- Form Decision Review Board
- Define Values across Leader Levels
  - Leading Others
  - Workday
- Implement:
  - Leading Others
  - Workday for HR Liaisons
- Website and Evaluation

**FY20**
- Develop and Pilot:
  - Leading Self
  - HR Liaison functional competency development
  - Commence Leading the Function, incl assessments, coaching, and simulation
  - Commence Business functional competency dev
- Implement:
  - Leading Others cont.
  - Evaluation – transactional and demographics on dashboard
  - Website
  - Commence Leading Self

**FY21**
- Develop and Pilot:
  - Complete Business functional competency dev
  - Complete Leading the Function, incl assessments, coaching, and sim
  - Orientation / On-boarding experience
  - Supervisor / Manager network conference
- Implement:
  - HR Liaison functional competency development
  - Complete Leading the Function, incl assessments, coaching, and sim
  - Orientation / On-boarding experience
  - Supervisor / Manager network conference
- Run:
  - Leading Others
  - Workday for HR Liaisons
  - Website
  - Evaluation

**FY22**
- Develop and Pilot:
  - Employee Engagement
  - OD services and practices
  - A&M Innovates conference
- Implement:
  - Business functional competency development
  - Complete Leading the Function, incl assessments, coaching, and sim
  - Orientation / On-boarding experience
  - Supervisor / Manager network conference
- Run:
  - Leading Others
  - Leading self
  - HR Liaisons functional dev
  - Website
  - Evaluation
Volunteers Thus Far

Melissa Easley (Admissions)
Neal Ellis (College of Engineering and TEES)
David Brown (UES)
John McCall (Assoc VP and Controller)
Brandy Kosh (Exec Dir, Academic Affairs)
Brynn Fitzpatrick Pinto (College of Liberal Arts)
Belinda Hale (Asst Dean, Vet Med)
Debbie Thomas (Dean, College of Geosciences)
Alicia Dorsey (Asst Provost, Office of Institutional Effectiveness and Evaluation)
Martin Scholtz (Exec Assoc VP, Research)
Annette Shenkier (Assoc VP, Research)
John O’Neill (Asst Dean, HSC Public Health)
Sharon Gibson-Mainka (Manager, TAMU IT)

Values and Leading Others
Deborah Wright (Assoc VP, Finance)
Tom Owen (Research)
Peggy Zapalac (Assoc VP, Univ Risk & Compliance)
Kelley Ervin (Transportation)
Suprena Bennett (College of Ed)
Jia Wang (College of Ed)
Jared Scoggins (College of Engineering)
Jingqiu Ren (Academic Affairs)
Brandi Plunkett (Mays Center for Exec Dev)
Cody Holland (College of Vet Med)
Eric Bowman (A&M Foundation)
Roger Martinez (Provost Office)
Kim Zemanek (HSC)
Stacy Overby (TTI)

Workday for HR Liaisons
Joe Corn (Payroll)
Crystal King (Science)
Lauren Milano (Vet Med)
Renee Weidemann (Research)
Megan Hoelscher (Transportation)
Brooklyn Smith (Psychology)
Rita Bowden (HROE)
Evelyn Castaneda (HROE)
Mary Schubert (HROE)
Laura Dohnalik (HROE)
Melanie Upton (HROE)
Scott Bauer (HROE)
Judy Kurtz (HROE)

Decision Review Board (DRB)

Working Group / Functional SME
Volunteers Thus Far (Continued)

**Leading Self**
- Tom Owen (Research)
- Peggy Zapalac (Assoc VP, Univ Risk & Compliance)
- Kelley Ervin (Transportation)
- Suprena Bennett (College of Ed)
- Cody Holland (College of Vet Med)
- Kim Zemanek (HSC)
- Stacy Overby (TTI)
- Reese Bunsie (Enrollment Services)
- Mia Conrad (College of Ed)
- Kurt Felpel (College of Economics)
- Cory Hearnberger (College of Engineering)
- Sarah McLaughlin (College of Vet Med)

**Functional Dev for HR Liaisons**
- Shauna Ramos – College of Architecture
- Erica Jones – College of Engineering / TEES
- Griselda Vazquez – College of Engineering / TEES
- Brooklyn Smith – College of Liberal Arts
- Lorie Tubbs – College of Liberal Arts
- Crystal King – College of Science
- Will Bailey – College of Science - Biology
- Megan Hoelscher – College of Veterinary Medicine
- Deborah Daniel – College of Veterinary Medicine
- Jeanne Andreski – Bush School
- Kimberly Syptak – Mays / Center for Exec Dev
- Kim Williamson – Division of Research
- Tanja Peterson – Student Affairs / Student Health
- Jovana Guillen – Provost Office / AABS
- Tara Hunter – Provost Office / AABS
- Nicole Filger – School of Public Health
- Darla Guerra – Transportation Services
- Mary Schubert/Laura Dohnalik/Melanie Upton
- Scott Bauer / Rita Bowden - HROE
- Clint Wolf - HROE
- Elizabeth Schwartz / Michelle Steedly - HROE

**Working Group / Functional SME**
Results Thus Far
Evaluation

Framed around:

- Progress
- Quality
- Impact

Progress toward business plan targets
Meet project timelines, # of planned events and participants, # of planned OD engagements, etc.

Quality of LL&OD products, services, and projects
Relevant and meaningful content, aligned with business needs, effective delivery, etc.

Overall value and impact of LL&OD on the business
Improved competencies, application of learning, achieved results, enabling Texas A&M’s mission, vision, values, and behaviors
# of Participants Jul – Dec 2019

NOTE: Employees may have completed more than one development activity.

Non-Unique

NOTE: Employees may have completed more than one development activity.

Unique Learners

NOTE: Does not account for employees who have completed more than one development activity.
Evaluation Results

“Hands on. Makes it feel more relevant and real life. I really like how interactive the class was. It is extremely beneficial for me to go through each process and be able to apply it to the work I do back in my department.”

“Looking forward to other Workday training. So much more useful than implementation!”

“You were able to be hands off with creating positions in Workday. Allowed to make mistakes and correct them without fear of deleting completely.”

“My knowledge of one time payments and compensation changes are now much clearer”

“Getting to understand what each field in the create job requisition task was for and which fields to utilize and which ones to not use - I have not been filing out all the necessary fields in previous job requisitions; and, assuming the recruiting partners was…”

<table>
<thead>
<tr>
<th>Quality</th>
<th>Anticipated Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Content and delivery was effective</td>
<td>Linked to business needs</td>
</tr>
<tr>
<td>91.69%</td>
<td>90.25%</td>
</tr>
<tr>
<td>Facilitators were effective</td>
<td>Learning will enable improved performance</td>
</tr>
<tr>
<td>92.62%</td>
<td>89.84%</td>
</tr>
<tr>
<td>Relevant to my job</td>
<td>Can apply learning to the job</td>
</tr>
<tr>
<td>91.55%</td>
<td>89.47%</td>
</tr>
<tr>
<td>Would recommend this course</td>
<td>Will be able to apply the learning to the job</td>
</tr>
<tr>
<td>90.53%</td>
<td>90.02%</td>
</tr>
</tbody>
</table>

Response Rate: 98.80%

Average Increase In Knowledge: 70.94%

Highest Increase In Knowledge
- Workday for HR Liaisons: Onboarding Process: 94.44%
- Workday for HR Liaisons: Essential: 33.96%
Results and Feedback Thus Far (Continued)

Quality
- Content and delivery was effective: 85.94%
- Facilitators were effective: 92.77%
- Relevant to my job: 93.75%
- Would recommend this course: 91.88%

Response Rate: 100.00%

Anticipated Impact
- Linked to business needs: 91.88%
- Learning will enable improved performance: 93.13%
- Can apply learning to the job: 86.88%
- Will be able to apply the learning to the job: 86.25%

- Average Increase In Knowledge: 76.75%
- Highest Increase In Knowledge:
  - Leading Others: Block 2: 85.18%
  - Lowest Increase In Knowledge:
  - Leading Others: Block 1: 68.33%

Required interaction with other participants was extremely useful, especially with participants from such varied areas of the university. The issues we deal with are not confined to just our section of the organization.

“I’ll be able to take the materials, books and discussion planner, etc., and immediately use them in my job. There was a focus on how to actually use these ideas and processes here at A&M.”

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“The material is very comprehensive and I enjoy the active learning environment. It would very hard if the material was presented in a lecture only format.”

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“Very comprehensive and I enjoy the active learning environment. It would very hard if the material was presented in a lecture only format.”

“This was the first time that I have participated in an event such as this and I am enjoying learning everything covered.”

“Very comprehensive and I enjoy the active learning environment. It would very hard if the material was presented in a lecture only format.”

“The adapting communication section and discussion planning material is fantastic and so helpful.”

“Very comprehensive and I enjoy the active learning environment. It would very hard if the material was presented in a lecture only format.”

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Leadership and Functional Development
Progressive Leadership Development
### Progressive Leadership Development

<table>
<thead>
<tr>
<th>Level</th>
<th>Target Audience</th>
<th>Description</th>
<th>Competencies</th>
</tr>
</thead>
</table>
| Leading Self       | Everyone                 | Under the content everyone is a leader – you do not have to be a supervisor or manager to lead at Texas A&M University, this is for everyone with an intent to help build a common language and practice (mental model). | - Texas A&M University mission, vision, values, organization  
- Interpersonal Effectiveness, including awareness of self and others, communication, behavior  
- Adapting to Change  
- Problem Solving and Process Improvement  
- Customer Service and Relationships  
- Functional / Role specific competencies (see previous page) |
| Leading Others     | Supervisors, project leads / managers, Faculty, Associate / Assistant Directors | This is for emerging leaders or leaders of individual contributors (formal, in-tact groups, project groups, or informal groups). The intent is to help one transition from being an individual performer to leading a group of people. | - Ethics, Rules, Regulations, SAPs  
- Financial Management  
- Adapting Interpersonal Style and Communication, including building and maintaining relationships  
- People Management and Development  
- Team Development  
- Valuing Differences  
- Conflict Management  
- Project and Change Management  
- Systems Thinking  
- Business Planning  
- Decision Making  
- Leading Change  
- People, Team, and Org Dev  
- Establishing and Driving Direction, Expectations, Performance, Results, and Accountability  
- Emotional Intelligence  
- Building and Maintaining Relationships (team, employees, cross-university)  
- Culture of Inclusion  
- Conflict Resolution  
- Contracts and Procurement  
- Negotiation  
- Policies, Procedures, Legal Issues, Ethics  
- Establishing Future Direction (purpose / mission, vision, culture, strategies, plans, competencies, resources, measures)  
- Awareness of and Working across functions, divisions, colleges, and System boundaries  
- Strategic Change  
- Driving Desired Outcomes, Results, and Accountability  
- Emotional Intelligence  
- Legal and Ethical Issues  
- Forward Thinking (Higher Ed, Organization, IT, Talent Management Issues and Opportunities) |
| Leading the Function | Directors, Department Heads, Associate Deans | This is for experienced leaders who lead other managers or senior level employees in departments or departmental functions with the intent to help transition to leading more strategically. | - Business Planning  
- Decision Making  
- Leading Change  
- People, Team, and Org Dev  
- Establishing and Driving Direction, Expectations, Performance, Results, and Accountability  
- Emotional Intelligence  
- Building and Maintaining Relationships (team, employees, cross-university)  
- Culture of Inclusion  
- Conflict Resolution  
- Contracts and Procurement  
- Negotiation  
- Policies, Procedures, Legal Issues, Ethics  
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- Strategic Change  
- Driving Desired Outcomes, Results, and Accountability  
- Emotional Intelligence  
- Legal and Ethical Issues  
- Forward Thinking (Higher Ed, Organization, IT, Talent Management Issues and Opportunities) |
| Leading the Organization | Deans and VPs | This is for senior leaders of organizational functions or divisions such with the intent to help transition to leading for the future. | - Business Planning  
- Decision Making  
- Leading Change  
- People, Team, and Org Dev  
- Establishing and Driving Direction, Expectations, Performance, Results, and Accountability  
- Emotional Intelligence  
- Building and Maintaining Relationships (team, employees, cross-university)  
- Culture of Inclusion  
- Conflict Resolution  
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Competency Map (CMap)

Competencies and competency descriptors of what people are expected to know and do such across four levels for leadership and key functional roles (e.g., HR, Business, IT, Advisor)

Leading Others Competency Map

<table>
<thead>
<tr>
<th>Competency</th>
<th>Awareness</th>
<th>Fundamental Application</th>
<th>Skilled Application</th>
<th>Mastery</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Conflict Management</strong></td>
<td>Recognizes how interpersonal style, communication, and relationships impact each other as well as work and the work environment.</td>
<td>Demonstrates appropriate and professional verbal, nonverbal, and written communication.</td>
<td>Creates and fosters an environment that builds and maintains trusting, respectful, and collaborative relationships and partnerships across boundaries, departments, divisions, and colleges.</td>
<td>Facilitates efforts to mitigate and address internal and external sources of conflict for the purposes of facilitating the growth and development of the university and the larger community, including:</td>
</tr>
<tr>
<td></td>
<td>Recognizes common interpersonal style, communication, and relationships impact each other.</td>
<td>Poster an environment that enables self and others to learn, value, and develop interpersonal and communication effectiveness.</td>
<td>Creates and fosters an environment that builds and maintains trusting, respectful, and collaborative relationships and partnerships across boundaries, departments, divisions, and colleges.</td>
<td>Recognized and sought by others across the University for experience and expertise in:</td>
</tr>
<tr>
<td></td>
<td>Recognizes how interpersonal style, communication, and relationships impact each other as well as work and the work environment.</td>
<td>Recognizes how emotions, behaviors, and actions can affect others.</td>
<td>Develops and delivers written and oral communication for the purposes of enhancing the University’s brand standards, accessibility.</td>
<td>- Developing and delivering communication, especially, large audiences.</td>
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<td></td>
<td>Identifies one’s interpersonal preferences, including strengths, development opportunities, and considerations in working with others.</td>
<td>Adapts interpersonal style and communication approach to improve communication, relationships, work, and work environment with others — within and outside of own organization.</td>
<td>Adapts interpersonal style and communication approach to create a healthy, engaged, productive work environment.</td>
<td>- Building and maintaining relationships and communities enhancing change.</td>
</tr>
<tr>
<td></td>
<td>Distinguishes between common communication approaches, tailoring communication:</td>
<td></td>
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<tr>
<td></td>
<td>- Topics of communication or nature of information being shared.</td>
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<td></td>
<td>- Audience member/manager.</td>
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<tr>
<td></td>
<td>- Purpose.</td>
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<tr>
<td></td>
<td>- Work environment.</td>
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<tr>
<td></td>
<td>- Organizational culture.</td>
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</tbody>
</table>

- Enhances positive conflict and dialogues within our organization to foster creative, productive, and effective thinking. | Recognizes and seeks out by others across the University for experience and expertise in facilitating difficult conversations and managing conflict. | Recognized and sought by others across the University for expertise and excellence in: |
| | | | | - Building and maintaining relationships and communities enhancing change. |
## Values

Values defined with behaviors across the progressive leadership levels

<table>
<thead>
<tr>
<th>TAMU Values</th>
<th>Overall Definition</th>
<th>Leading Self</th>
<th>Leading Others</th>
<th>Leading the Function</th>
<th>Leading the Organization</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>values</strong></td>
<td>Individual contribution</td>
<td>everyone</td>
<td>supervisors, professors, project leaders, managers</td>
<td>experienced leaders with direct managerial or line responsibility without employees in departments or organizational units</td>
<td>senior executive organizational function, college, or division</td>
</tr>
<tr>
<td><strong>Target Audience</strong></td>
<td>We believe people matter. We value and treat ourselves and others with care, compassion, dignity, civility, and fairness. We appreciate, learn from, and create a welcoming and inclusive environment that values representation, diversity, and community—identity, competence, experience, and ideas.</td>
<td>Nurtures a culture of belonging and connection within the organization.</td>
<td>Demonstrates and fosters a culture of cooperation, collaboration, and respect in which people are welcomed, valued, supported, and treated with care, compassion, dignity, civility, and fairness with others.</td>
<td>Establishes and fosters a welcoming environment and culture of diversity and inclusion.</td>
<td>Champions and unifies others to create a diverse and inclusive environment and culture.</td>
</tr>
<tr>
<td><strong>values</strong></td>
<td>We are dedicated to excel in others we do and communicate, and we continually strive to improve. We are passionate about delivering results and achieving desired outcomes, impact, and value that exceeds expectations—of our own and of others.</td>
<td>Demonstrates high quality, impact, and value in work and work results.</td>
<td>Establishes and manages expectations that enable desired outcomes, high quality, value, and impact.</td>
<td>Keeps abreast of and anticipates internal and external factors that may hinder or enable the success of our organization.</td>
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<td><strong>values</strong></td>
<td>We are dedicated to excel in others we do and communicate, and we continually strive to improve. We are passionate about delivering results and achieving desired outcomes, impact, and value that exceeds expectations—of our own and of others.</td>
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</tr>
<tr>
<td><strong>values</strong></td>
<td>We set the example. We embody our values: We are courageous and forward thinking, embracing change and propelling ourselves and the university, unselfish, and empower each other.</td>
<td>Carries out acts, and lives our values.</td>
<td>Develops others to demonstrate our values.</td>
<td>Models our values.</td>
<td>Champions and steward our values and leaders who exemplify them.</td>
</tr>
<tr>
<td><strong>values</strong></td>
<td>We are dedicated to a greater purpose. We trust, respect, and support each other. We are stronger and better together because of our shared support of the university.</td>
<td>Demonstrates dedication to each other and the university’s mission, vision, values, and community in work and behaviors.</td>
<td>Ensures priorities and expectations align with and enable those of the larger organization.</td>
<td>Fosteres an environment that unifies people, work, and resources around the greater purpose of what we do and who we are—fostering both the university mission and vision, and values.</td>
<td>Champions and unifies people, work, and resources around a greater purpose of what we do and who we are—fostering both the university mission and vision, and values.</td>
</tr>
</tbody>
</table>

### TAMU Values

- **Inclusiveness:** Values defined with behaviors across the progressive leadership levels.
- **Respect:** Values defined with behaviors across the progressive leadership levels.
- **Excellence:** Values defined with behaviors across the progressive leadership levels.
- **Leadership:** Values defined with behaviors across the progressive leadership levels.
- **Loyalty:** Values defined with behaviors across the progressive leadership levels.
### Learning & Development (L&D) Path

Aid for employees and supervisors outlining recommended L&D activities to help someone get to ideally Skilled Application.

#### Business Coordinator L&D Path

<table>
<thead>
<tr>
<th>Role Specific Competencies</th>
<th>Financial Management</th>
<th>Leadership</th>
<th>Microsoft Software</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel</td>
<td>Account Basics</td>
<td>Diversity &amp; Inclusion</td>
<td>Word</td>
</tr>
<tr>
<td>Procurement</td>
<td></td>
<td>Conflict Management</td>
<td>Excel</td>
</tr>
<tr>
<td>Expense</td>
<td></td>
<td>Personality Preference</td>
<td>PowerPoint</td>
</tr>
<tr>
<td>Budgeting</td>
<td></td>
<td>Communication</td>
<td></td>
</tr>
<tr>
<td>Business Planning</td>
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</tr>
</tbody>
</table>

#### Target Competency Levels

<table>
<thead>
<tr>
<th>Awareness</th>
<th>Fundamental Application</th>
<th>Skilled Application</th>
<th>Mastery</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brand new to the role/function at Texas A&amp;M - learning the university's nomenclature, processes, practices, etc.</td>
<td>Applying the role/function's core competencies in a small group or working with more experienced individuals on a specific project in a larger group</td>
<td>Autonomous in leading others in the role/function</td>
<td>Building individual and organizational competency for the role/function</td>
</tr>
</tbody>
</table>

#### Development Activities

- New Employee Welcome WBT
- Workday Onboarding WBT w/ "kift" (e.g. UNI, benefits, contracts, fines, instructions, policies)
- New Employee Orientation WBT w/ "kift"
- Big 5 WBT's
- Business Coordinator Financial Management 200 curriculum

#### On the Job Activities

- Administrator Accounting in FAMIS
- Administrator Inventory in Canvas
- Work in a department specific project
- Observe a faculty member prepare for and teach a class
- Face to face ICT class
- Virtual class

- Microsoft software 200
- Microsoft software 200
- CSBA Conference
- CSBA Network meetings
- Diversity & Inclusion 200
- Personality & Preference 200
- AAM Innovates Conference
- Conflict Management
- MS Excel 400

#### Years

- 1 – 2 years
- 5 – 10 years
- 10+ years
Competency-based and Progressive Development

Development based on:

- Competencies, or what one needs to know and do, for key functional roles across the University
- Progression of development versus “one and done”

At some point (usually between Fundamental & Skilled), one may ask:

- Continue developing functional / technical competencies and be a functional / technical expert?
  - OR -
- Move into Management / Administration?
Tying It Together – Potential New Hire L&D Journey

**Orientation/Onboarding**
- 30 d
- 90 d
- 6 mo
- 1 yr
  - Other HR/Orientation experiences to learn more about the University, history, traditions, culture...

**Leading Self Learning Journey**
- 30 d
  - TAMU Mission, Vision, Values
  - Interpersonal Effectiveness
  - Diversity and Inclusion
  - Customer Service
  - Problem Solving and Process Improvement
  - Adapting to Change
  - Leading Self Capstone
  - Leading Self Graduation Ceremony

**Functional Development Learning Journey**
- 30 d
- 6 mo
- 1 yr
- 1.5 yr
  - Awareness and Fundamental for 1-2 competencies
  - Fundamental and Skilled Application
  - Awareness and Fundamental for another 1-2 competencies
  - Fundamental and Skilled Application
Design of Functional Development for HR Liaisons
Time Off and Leave of Absence

Block 1 – Conceptual Pre-requisite

- **T – 10**
  - Pre-assessment
  - Baseline competency

- **T – 45**
  - Kickoff Meeting w/ EE and Manager
  - Learning journey, timeline, expectations

- **Weeks 1 - 4**
  - Time-off and Leave of Absence eLearning
  - Payroll eLearning
  - Compensation eLearning
  - Time & Effort WBT (2/11113)
  - Employment Law et al eLearning

- **Week 5**
  - Application ILT (two - 3 hours)
  - Post-assessment (at least 85%)

Block 2 – Workday and Software Processing

- **Week 6**
  - Enter Time Off and Absence (1.5 hours)
  - Establish and certify Time and Effort role

- **Week 7**
  - Capstone
Payroll

Block 1 – Conceptual Pre-requisite

- **T – 60** Kickoff Email to EE and Manager
  - Purpose, learning objectives, key dates, and kickoff meeting invitation

- **T – 45** Kickoff Meeting w/ EE and Manager
  - Learning journey, timeline, expectations

**T – 10** Pre-assessment
- Baseline competency

** Weeks 1 - 5**
- Payroll eLearning
- Nonresident Alien Tax Issues & Cladir eLearning
- Compensation eLearning
- Reward & Recognition eLearning
- Employment Law eLearning
- International Withholding Tax (IWT) eLearning

** Week 6**
- Application ILT (two - 3 hours)
- Post-assessment (at least 55%)

Block 2 – Workday and Software Processing

**Week 7** Break

**Week 8**
- Request Compensation Change vs. One-Time Payment (1.5 hours)

**Week 9**
- Overtime Regulations
- Time Tracking in Workday
- Pay Calculations in Workday

**Week 10** Capstone
Recruiting, Hiring, & Onboarding

What is the difference between interviewing students versus other employees? Why does SFPAID have a separate course? Note, provided for off-campus employers; so, may be geared toward them. Parking Lot – confirm with SFPAID and is there opportunity to reinstate interviewing course offered by HR and could be used by both.

What about coaching and counseling course offered under old HR BPP cert program?

**Block 1 – Conceptual Pre-requisite**

- **T – 10**
  - Pre-assessment
  - Baseline competency

**Weeks 1 - 5**
- Recruiting eLearning
- Employment Law at eLearning
- Hiring eLearning
- Onboarding eLearning
- SFPAID Hiring Students ILT
- SFPAID Interviewing Students ILT

**Week 6**
- Application ILT (two - 3 hours)
- Post-assessment (at least 60%)

**Block 2 – Workday and Software Processing**

**Week 10 – 12**
- Glacier
- XDef
- Search for and Manage UMN
- Reset UMN passwords
- Duo Mobile authentication

**Week 9**
- Break

**Week 8**
- Recruiting Process (3 hours)

**Week 7**
- Create Job Requisition (2.5 hours)

**Week 13**
- Onboarding (3 hours)

**Week 14**
- Break

**Week 15**
- Capstone
Position Management & Compensation

Block 1 – Conceptual Pre-requisite

**T – 10**
Pre-assessment
Baseline competency

**Weeks 1 - 5**
- Payroll eLearning
- Nonresident Alien Tax Issues & Glacier eLearning
- Compensation eLearning
- Reward & Recognition eLearning
- Employment Law eLearning
- International Withholding Tax (US) eLearning

**Week 6**
- Application ILT (two - 3 hours)
- Post-assessment (at least 70%)

Block 2 – Workday and Software Processing

**Week 7**
- Bi-weekly Payroll

**Week 8**
- Request Compensation Change vs. One-Time Payment (1.5 hours)

**Week 9**
- Overtime Regulations
- Time Tracking in Workday
- Pay Calculations in Workday

**Week 10**
*Capstone*

**T – 45**
Kickoff Meeting w/ EE and Manager
Learning journey, timeline, expectations

**T – 60**
Kickoff Email to EE and Manager
Purpose, learning objectives, key dates, and kickoff meeting invitation
Benefits

T - 60
Kickoff Email to EE and Manager
Purpose, learning objectives, key dates, and kickoff meeting invitation

T - 45
Kickoff Meeting w/ EE and Manager
Learning journey, timeline, expectations

T - 10
Pre-assessment
Baseline competency

Weeks 1 - 4
- Benefits eLearning
- Benefits in Workday such as screenshot and steps to add child, documentation needed
- Employment Law eLearning
- Rewards and Recognition eLearning
- Benefits Orientation ILT
- Retirement Planning ILT

Week 5
- Application ILT (one - 2 hour)
- Post-assessment (at least 85%)
Employee Relations

- **T - 60**
  - Kickoff Email to EE and Manager
  - Purpose, learning objectives, key dates, and kickoff meeting invitation

- **T - 45**
  - Kickoff Meeting w/ EE and Manager
  - Learning journey, timeline, expectations

- **T - 10**
  - Pre-assessment
  - Baseline competency

- **Weeks 1 - 7**
  - Employment Law eLearning
  - Employee Relations eLearning
  - First report of injury in Origami (confirm this is WBT)
  - CSA (Clean Air) WBT
  - Perf Mgmt - ee eLearning
  - Perf Mgmt - mg eLearning
  - Performance Review eLearning
  - Rewards and Recognition eLearning

- **Week 8**
  - Application ILT (two - 3 hours)
  - Post-assessment (at least 85%)

Parking Lot - Since inconsistently used across campus and different setup, access, and upload personnel files in HRConnect and Liferay should be part of development back in department.

Application ILT:
- Have scenario with termination and other in which someone peacefully resigned
- Have termination role-play scenario – “normal” and “hostile”
- Have scenario which involves RIF with Employee Relations rep
Outlook, Word, & Excel

**Block 1 – Conceptual Pre-requisite**

- **T – 10**
  - Pre-assessment
  - Baseline competency

- **Weeks 1 - 2**
  - Outlook eLearning
  - Excel eLearning
  - Post-assessment (at least 85%)

**Block 2 – Software Processing**

- **Week 5**
  - Capstone

- **Weeks 3 - 4**
  - Application ILT (two - 3 hours)
  - Post-assessment (at least 85%)

**T – 60**
- Kickoff Email to EE and Manager
  - Purpose, learning objectives, key dates, and kickoff meeting invitation

**T – 45**
- Kickoff Meeting w/ EE and Manager
  - Learning journey, timeline, expectations
## Potential Certificates by Workday Security Role

<table>
<thead>
<tr>
<th>Course</th>
<th>HR Contact</th>
<th>Absence Partner</th>
<th>Timekeeper</th>
<th>I-9 Processor</th>
<th>Talent Analyst</th>
<th>Recruiting Coordinator</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time Off and Leave of Absence (7 weeks)</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Payroll (10 weeks)</td>
<td>✓</td>
<td></td>
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</tr>
<tr>
<td>Recruiting, Hiring, and Onboarding (15 weeks)</td>
<td>✓</td>
<td></td>
<td></td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
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<tr>
<td>Position Management and Compensation (15 weeks)</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>✓</td>
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<tr>
<td>Benefits (5 weeks)</td>
<td>✓</td>
<td></td>
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<td></td>
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</tr>
<tr>
<td>Employee Relations (8 weeks)</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Optional: Outlook and Excel (5 weeks)</td>
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</table>
Next Steps
Overall Shaping Plan

**FY19**
- Form Decision Review Board
- Define Values across Leader Levels
- Develop and Pilot:
  - Leading Others
  - Workday
- Implement:
  - Leading Others
  - Workday for HR Liaisons
- Website and Evaluation

**FY20**
- Develop and Pilot:
  - Leading Self
  - HR Liaison functional competency development
  - Commence Leading the Function
  - Commence Business functional competency development
- Implement:
  - Leading Others cont.
  - Evaluation – transactional and demographics on dashboard
  - Website
  - Commence Leading Self

**FY21**
- Develop and Pilot:
  - Complete Business functional competency development
  - Complete Leading the Function
  - Orientation / On-boarding experience
  - Supervisor / Manager network conference
- Implement:
  - HR Liaison functional competency development
  - Leading Self
- Run:
  - Leading Others
  - Workday for HR Liaisons
  - Website
  - Evaluation

*We Are Here*
1. Making GREAT progress on future direction
2. Much appreciation for your patience during this transition
3. Extend kudos and appreciation to the OD team and those who have been on the journey with us thus far!
# Volunteers Thus Far

<table>
<thead>
<tr>
<th>Values and Leading Others</th>
<th>Workday for HR Liaisons</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deborah Wright (Assoc VP, Finance)</td>
<td>Joe Corn (Payroll)</td>
</tr>
<tr>
<td>Tom Owen (Research)</td>
<td>Crystal King (Science)</td>
</tr>
<tr>
<td>Peggy Zapalac (Assoc VP, Univ Risk &amp; Compliance)</td>
<td>Lauren Milano (Vet Med)</td>
</tr>
<tr>
<td>Kelley Ervin (Transportation)</td>
<td>Renee Weidemann (Research)</td>
</tr>
<tr>
<td>Suprena Bennett (College of Ed)</td>
<td>Megan Hoelscher (Transportation)</td>
</tr>
<tr>
<td>Jia Wang (College of Ed)</td>
<td>Brooklyn Smith (Psychology)</td>
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<tr>
<td>Jared Scoggins (College of Engineering)</td>
<td>Rita Bowden (HROE)</td>
</tr>
<tr>
<td>Jingqiu Ren (Academic Affairs)</td>
<td>Evelyn Castaneda (HROE)</td>
</tr>
<tr>
<td>Brandi Plunkett (Mays Center for Exec Dev)</td>
<td>Mary Schubert (HROE)</td>
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<tr>
<td>Cody Holland (College of Vet Med)</td>
<td>Laura Dohnalik (HROE)</td>
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<tr>
<td>Eric Bowman (A&amp;M Foundation)</td>
<td>Melanie Upton (HROE)</td>
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<tr>
<td>Roger Martinez (Provost Office)</td>
<td>Scott Bauer (HROE)</td>
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<tr>
<td>Kim Zemanek (HSC)</td>
<td>Judy Kurtz (HROE)</td>
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<tr>
<td>Stacy Overby (TTI)</td>
<td></td>
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</table>

<table>
<thead>
<tr>
<th>Decision Review Board (DRB)</th>
<th>Working Group / Functional SME</th>
</tr>
</thead>
<tbody>
<tr>
<td>Melissa Easley (Admissions)</td>
<td></td>
</tr>
</tbody>
</table>
Volunteers Thus Far (Continued)

**Leading Self**
- Tom Owen (Research)
- Peggy Zapalac (Assoc VP, Univ Risk & Compliance)
- Kelley Ervin (Transportation)
- Suprena Bennett (College of Ed)
- Cody Holland (College of Vet Med)
- Kim Zemanek (HSC)
- Stacy Overby (TTI)
- Reese Bunsie (Enrollment Services)
- Mia Conrad (College of Ed)
- Kurt Felpel (College of Economics)
- Cory Hearnberger (College of Engineering)
- Sarah McLaughlin (College of Vet Med)

**Functional Dev for HR Liaisons**
- Shauna Ramos – College of Architecture
- Erica Jones – College of Engineering / TEES
- Griselda Vazquez – College of Engineering / TEES
- Brooklyn Smith – College of Liberal Arts
- Lorie Tubbs – College of Liberal Arts
- Crystal King – College of Science
- Will Bailey – College of Science - Biology
- Megan Hoelscher – College of Veterinary Medicine
- Deborah Daniel - College of Veterinary Medicine
- Jeanne Andreski – Bush School
- Kimberly Syptak – Mays / Center for Exec Dev
- Kim Williamson – Division of Research
- Tanja Peterson – Student Affairs / Student Health
- Jovana Guillen – Provost Office / AABS
- Tara Hunter – Provost Office / AABS
- Nicole Filger – School of Public Health
- Darla Guerra – Transportation Services
- Mary Schubert/Laura Dohnalik/Melanie Upton
- Scott Bauer / Rita Bowden - HROE
- Clint Wolf - HROE
- Elizabeth Schwartz / Michelle Steedly - HROE

**Working Group / Functional SME**
Tara D Gray
Director, Organization Development
979.862.7615
tara.d.gray@tamu.edu

employees.tamu.edu