UPDATE: Functional Development for HR Liaisons

Human Resources & Organizational Effectiveness

June 24, 2020
Improving Transforming how we develop Texas A&M University employees
Competency-based Progressive Development
Competency-based Progressive Dev

Development based on:

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

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

- Continue developing functional / technical competencies and be a functional / technical expert?
  - OR -
- Moving into Management / Administration?
Competency Map (CMap)

Getting VERY clear about what people are expected to know and do via core competencies and competency descriptors across four levels for key roles – functional and leadership

<table>
<thead>
<tr>
<th>Competency</th>
<th>Awareness</th>
<th>Fundamental Application</th>
<th>Skillful Application</th>
<th>Mastery</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position Management &amp; Compensation</td>
<td>Recognizes the purpose of relationship between job titles, position descriptions, pay grades, merit pay, career ladders, compensation changes, risk status, system-wide salary plans, as well as selecting qualifications for jobs and compensation changes.</td>
<td>Monitors and communicates the following for respective organization with discretion and in alignment with established processes, practices, policies, rules, regulations, and SAPs: - Compensation Changes - Creating positions - Reassigning positions - Updating position description - Promotions - Transfers - Review - Appointments - Compensation - Performance (goals/performance) - Total compensation - Additional jobs - Retained placement</td>
<td>Leads or oversees others in administering staffing and compensation within own organization, ensuring - Consistency and alignment with established processes, practices, policies, regulations, rules, and SAPs - Use and application of appropriate practices and resources - Issues are prioritized and assigned in an appropriate and timely manner.</td>
<td>Champions and stewards consistent staffing and compensation practices across the University.</td>
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<td>Recognizes the purpose of relationship between compensation and compensation differences for similar positions (e.g., education, experience, market, comparison with what others are doing, benefits).</td>
<td>Tailors generic position descriptions to accommodate specific responsibilities for a position as needed. Submits appropriate position management and compensation documentation (e.g., templates) in a complete and timely manner. Writes effective compensation and promotion justifications which are in line with established policies, regulations, rules, and SAPs. Assesses qualifications and eligibility for hiring, compensation, compensation changes, and promotions, ensuring they are effective, in line with established policies, rules, and SAPs.</td>
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</table>

Position Management & Compensation

- Monitors and communicates the following for respective organization with discretion and in alignment with established processes, practices, policies, rules, regulations, and SAPs:
  - Compensation Changes
  - Creating positions
  - Reassigning positions
  - Updating position description
  - Promotions
  - Transfers
  - Review
  - Appointments
  - Compensation
  - Performance (goals/performance)
  - Total compensation
  - Additional jobs
  - Retained placement

Mastery

- Champions and stewards consistent staffing and compensation practices across the University.
- Recognized and sought out for staffing and compensation experience and expertise across the University and System.
- Leads or actively participates in staffing and compensation related individual and organization development efforts that impact the University and/or System level, including:
  - Sharing knowledge and experience (e.g., content review, development, and delivery)
  - Seizing, mining, and integrating recruitment processes and insights from other peer leading organizations
  - Helping improve processes and practices across the University and System
  - Making credibility, imprimatur, and mission critical policies, regulations, rules, and tools
  - Advancing, coaching, and mentoring others, especially new HR leaders across the system
  - Advancing development activities and networking participation in development activities
Learning Content

Learning Content driven by the CMap – if people are expected to:

• Know it at the Awareness level, they need to be educated on it.
• Do it in the Fundamental Application level, we try to prepare them for it.
Learning & Development (L&D) Path

Recommended L&D activities across the four competency levels for a specific role.

A tool to help employees and supervisors identify L&D activities such as a course, self-directed learning, on the job activity to help one develop competencies.

### 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></td>
<td>• Diversity &amp; Inclusion</td>
<td>• Word</td>
</tr>
<tr>
<td>• Procurement</td>
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<td>• Conflict Management</td>
<td>• Excel</td>
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<td>• Expense</td>
<td></td>
<td>• Personality Preferences</td>
<td>• PowerPoint</td>
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<td>• Budgeting</td>
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<td>• Communication</td>
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<td>• Business Planning</td>
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</table>

#### Target Competency Levels

- **Awareness**
  - Brand new to the role/function
  - Training university, orientation, processes, practices, etc.

- **Fundamental Application**
  - Applying the role/function core competencies
  - In a small group or working with more experienced business core competencies in a larger group

- **Skilled Application**
  - Autonomous in the role function

- **Mastery**
  - Building individual and organization competency for the role function

#### Development Activities

- **New Employee Welcome WBT**
  - Workday On-boarding WBT w/ "BIT" (e.g., UN benefits, services, forms, instructions, guides)
- **New Employee Orientation WBT w/ "BIT"**
- **15th WBTs**
- **Business Coordinator Financial Management 200 curriculum**

- **On the Job Activities**
  - Administer Accounting in PAMIS
  - Administer Inventory in Canvas
  - Work in a department specific project
  - Observe a faculty member prepare for and teach a course
  - Face to face IT class
  - Virtual class

- **Microsoft Software**
  - Microsoft Word 2000
  - Microsoft Excel 2000
  - CSBA Conference
  - CSBA Network meetings
  - Diversity & Inclusion 200
  - Personality Preferences 200
  - AAM Innovation Conference
  - Cost Management MS Excel 400

<table>
<thead>
<tr>
<th>1 - 2 years</th>
<th>5 - 10 years</th>
<th>10+ years</th>
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Shaping Plan
Our Shaping Plan

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

**FY20**
- Develop and Pilot:
  - HR Liaison functional competency development
  - Leading Self
  - Website
  - Commence Leading the Function
  - Commence Business functional competency development
- Implement:
  - Leading Others
  - Evaluation – transactional and demographics
  - Website
  - 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
Functional Development for HR Liaisons
Schedule

Kickoff Meeting

Sept 4

Sept - Nov

Nov

Nov - Dec

January

Jan - May

Jun - Aug

August

TBD

DRB Meeting
Endorse Leading Self CMap, Design, and pilot participants

DRB Meeting
Endorse HR Functional Development CMap, Design, and pilot participants

DRB Meeting
Review HR Functional Development Pilot Outcomes, Endorse any Design Revisions and Implementation Plan

Commence Revisions and Implementation

Jun – Sept
Leading Self Pilot

Working Sessions
- Competencies
- Competency descriptors
- Design
- Recommended pilot participants

Socialize CMap, design, and pilot participants (ABOC, HR Advisory group, CSBA)

Develop content

Pilot

Jun – Sept
Leading Self Pilot

Sept - Nov

Nov - Dec

January

Jan - May

Jun - Aug

August

TBD
Working Group Meetings

9 – 11:30 a.m. Fridays

September

4th
13th

Competencies

October

4th
11th
25th

November

1st
8th
15th
22nd

December

6th

Competency Descriptors

Design and Pilot Participants

Competencies
## Competency Map (CMap)

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<tr>
<td><strong>Position Management &amp; Compensation</strong></td>
<td>Recognizes the purpose of, relationship between, and key considerations for workforce assessment, planning, and staffing.</td>
<td>Monitors and administers the following for respective organization with discrimination in alignment with established processes, practices, policies, rules, regulations, and SFAs: - Compensation changes - Creating positions - Rebalancing positions - Update position description - Promotions - Transfers - Commissions - Compliments - Cost of living adjustments (COLAs) - Cost of living adjustment (COLA) - Additional pay - Employment contracts/terms - Dual employment - Additional job - Internal job opportunities</td>
<td>Leads or oversees others in administering staffing and compensation within own organization, ensuring: - Consistency and alignment with established processes, practices, policies, regulations, rules, and SFAs - Use and application of appropriate practices and resources - Issues are resolved or addressed in an appropriate and timely manner</td>
<td>Champions and stewards consistent staffing and compensation practices across the University. Recognizes and solicits feedback for staffing and compensation practices and expertise across the University and System. Leads or actively participates in staffing and compensation related individual and organization competency development efforts that impact the University and/or System (including): - Sharing knowledge and experience (e.g., context reviews, development, and delivery) - Coaching, advising, and facilitating benchmark practices and learning from other Texas A&amp;M organizations - Helping improve processes and practices across the University and System - Helping establish, implement, and manage policies, regulations, rules, and standards - Educating, coaching, and mentoring others, especially new HR leaders across the University - Facilitating development activities and, assisting with participation in development activities</td>
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<td>Recognizes the purpose of, relationship between, processes, timing, roles, and responsibilities of compensation changes and the merit process.</td>
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<td>Differentiates between roles and responsibilities of the manager, HR liaison, payroll, and HR related organizations (e.g., HOPE, Division of Human Resources, Professional Studies (DGSAPS), Research, and Student Financial Aid (SFAS), International Services for Faculty and Scholars (SIFS), International Student Services (ISS)),</td>
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<td>Locates and uses resources to address position management and compensation questions and issues.</td>
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<td>Recognizes factors that influence compensation and compensation differences for similar positions (e.g., education, experience, market, comparison with what others are doing, benefits).</td>
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<td>Recognizes the purpose of and relationship between job titles, position descriptions, pay grades, merit pay, career ladders, compensation changes, visa status, Systemwide pay plan, as well as evaluating qualifications for jobs and compensation changes.</td>
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<td>Identifies required documentation to support position management and compensation processes (e.g.,</td>
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Curriculum Design

Competency-based – conceptual and processing (e.g., Workday)

Progressive

Modular

Focused on:

- Blended Learning (eLearning, self-directed, ILT)
- Quickly locate and access info / resources
- Teaching to Fish
- Experiential / Application-based
- Competency validation and Coaching from SMEs
## Content Mapping

If need to know it, where is it documented and available?

<table>
<thead>
<tr>
<th>Compliance Description</th>
<th>Key-Mineral Standard</th>
<th>Location</th>
<th>Notes</th>
<th>Other Complexities</th>
<th>Time Required</th>
<th>Training Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identify required information to support the position management and compensation process in a template, as well as explanations of how the template is filled out and completed in a standard manner.</td>
<td>Yes</td>
<td><a href="https://example.com/compensation/template.pdf">https://example.com/compensation/template.pdf</a></td>
<td>Link 1: Employee's Compensation Guide</td>
<td></td>
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<tr>
<td>Identify required information to support the position management and compensation process in a template, as well as explanations of how the template is filled out and completed in a standard manner.</td>
<td>No</td>
<td><a href="https://example.com/compensation/nocompliance-template.pdf">https://example.com/compensation/nocompliance-template.pdf</a></td>
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<tr>
<td>Competency Description</td>
<td>Yes/No</td>
<td>Location</td>
<td>Notes</td>
<td>Other Competency</td>
<td>Notas2</td>
<td>Possible delivery method</td>
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<td>Recognizes the purpose, relationship between processes, timing, roles, and responsibilities of compensation changes and the merit process.</td>
<td>Yes</td>
<td><a href="#">Link 1</a></td>
<td><a href="#">Notes 1</a></td>
<td>Employee Recognition &amp; Reward Worker</td>
<td>TraIn course</td>
<td>1. Wiki page defining what key terms mean (e.g., education, experience, market) and what others are doing, benefits. 2. Links to established websites and any training sites.</td>
</tr>
<tr>
<td></td>
<td>No</td>
<td><a href="#">Link 1</a></td>
<td><a href="#">Notes 1</a></td>
<td></td>
<td></td>
<td>1. Wiki page - examples of compensation influences and differences for similar positions. 2. E-learning micro course based on position types and their influences.</td>
</tr>
<tr>
<td>Recognizes factors that influence compensation and compensation differences for similar positions (e.g., education, experience, market).</td>
<td>Yes/No</td>
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<tr>
<td>Identifies required documentation to support the position management and compensation processes (e.g., templates), as well as implications of not accurately completing and completing in a timely manner.</td>
<td>Yes/No</td>
<td><a href="#">Link 1</a></td>
<td><a href="#">Notes 1</a></td>
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<td></td>
<td>1. Wiki page with links to templates based on process/position type. 2. On Wiki page, info regarding implications of done/not done, good/poor. 3. Web conference on how to complete templates. 4. Micro eLearning on how to complete templates.</td>
</tr>
</tbody>
</table>
If need to know it, where is it documented and available?

Good news... for the most part, found something!

With opportunity to improve.
Learning Content

Just in Time Learning and On the Job Support

- Pull resources together
- Facilitate quick access and reference
- Provide more explanation or context around concepts, processes, procedures, etc.

Curriculum Content

- Such as Application ILT scenarios, Capstone case study, answers, etc.
Village Enabling
Success
Village

Nancy De Leon
Becky McNair
Deborah Mejia
Garrett Hancock
Elizabeth Schwartz
Michelle Steedly
Melanie Upton
Laura Dohnalik
Mary Schubert
Scott Bauer
Rita Bowden
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 Med
Deborah Daniel - College of Veterinary Med
Jeanne Andreski – Bush School
Kimberly Syptak – Mays / Center for Exec Dev
Kim Williamson – Division of Research
Tanja Peterson – Student Affairs / Health
Abby VandenBrink – Student Affairs / Health
Jovana Guillen – Provost Office / AABS
Tara Hunter – Provost Office / AABS
Elizabeth Galvan – Provost Office / AABS
Nicole Filger – School of Public Health
Darla Guerra – Transportation Services
Schedule

Kickoff Meeting

DRB Meeting
Endorse Leading Self CMap, Design, and pilot participants
Sept 4

Sept - Nov

Nov

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Nov - Dec

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Feb - Oct

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Develop content

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Nov - Mar

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Commence Revisions and Implementation

Pilot

Working Sessions
- Competencies
- Competency descriptors
- Design
- Recommended pilot participants

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Socialize CMap, design, and pilot participants (ABOC, HR Advisory group, CSBA)

Nov - Dec

Jan - May

Jun – Sept

Leading Self Pilot

Jun

Commence Leading the Function dev
Improving Transforming how we develop Texas A&M University employees

LEARN MORE about our future direction

Welcome to Organization Development
Enabling your learning, development, leadership, and impact within the Texas A&M community

About Us and Our Future Direction
Leadership Development
Development and Resources for Your Role
1. Slower than anticipated; but, making progress.
2. THANK YOU to those who have been involved to help make this successful!!!
3. If interested in being a pilot participant, sent an email to...orgdev@tamu.edu
4. THANK YOU for your patience during this transition!