TEXAS★STATE
HUMAN RESOURCES

HR Forum

WELCOME

HR Forum Committee

Function:

To facilitate two-way communication with departments on a variety of HR issues.

Campus Carry

Dr. Vicky Brittain
Special Assistant to the President

Performance Management Implementation

Tammy Coyle,
Employee Relations Coordinator

Joyce Munoz,
Associate Director, Enterprise Systems,
Core Systems

OVERVIEW

- Texas State desires to have a more effective performance management process to:

  o enhance the way your performance is valued;

  o continually communicate expectations;

  o align individual roles to department, divisional and university goals and objectives; and

  o support Bobcat staff to achieve career goals.

WHAT IS CHANGING?

- Five key aspects are changing:

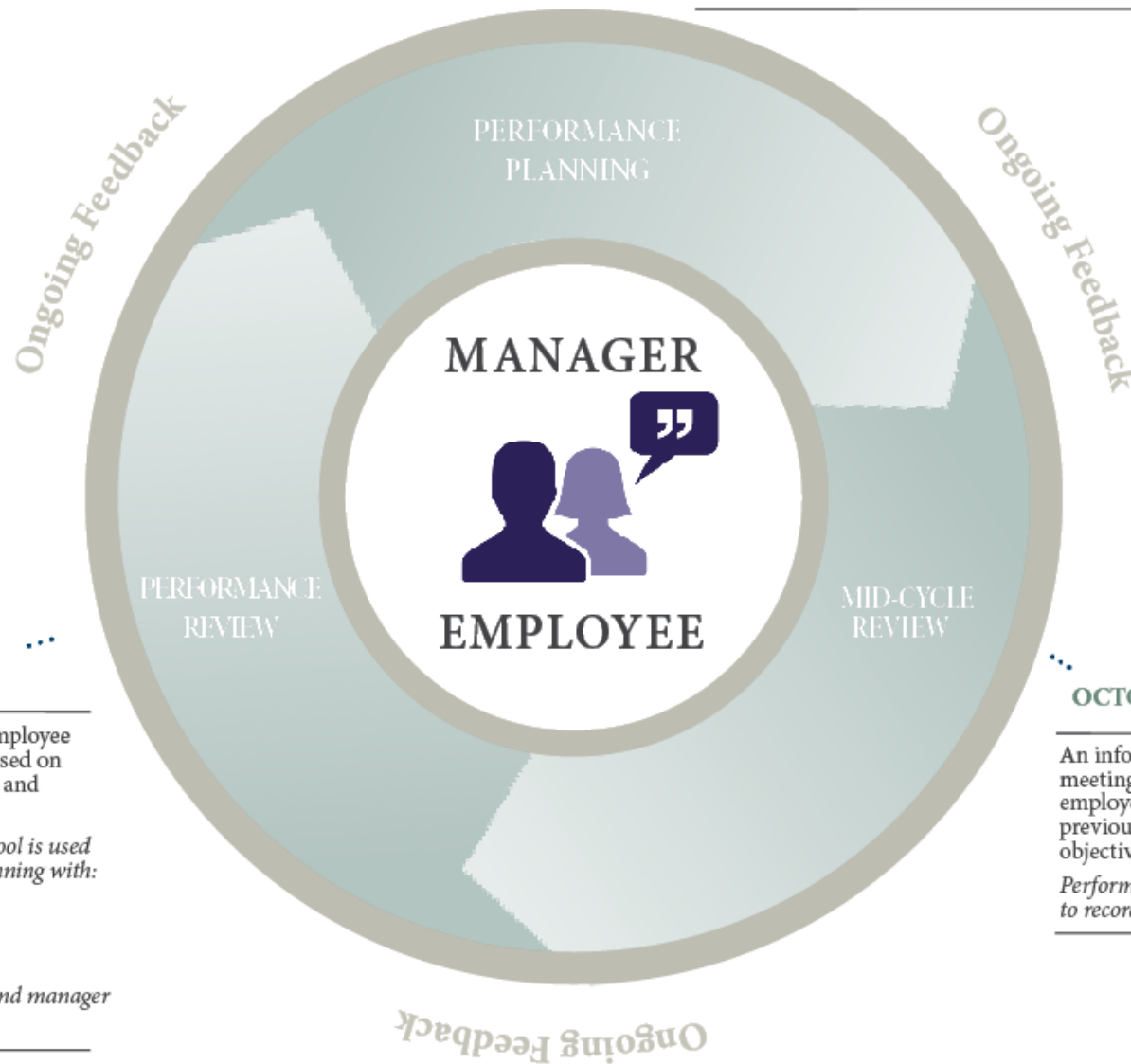| Current	New
One-time appraisal	Continuous performance process
Guidelines Oriented Job Analysis (GOJA)	Performance Planning Online Tool
Limited performance criteria	Comprehensive performance criteria
Numeric score	Qualitative assessment
Merit based on numeric score	Merit based on overall performance criteria

THE NEW
PERFORMANCE MANAGEMENT PROCESS

JUNE 1

Process of identifying what you want to accomplish and creating a plan on how to achieve your desired results within a specific time frame.

Performance Planning Tool is used to create SMART goals, set objectives, establish duties and responsibilties.

PERFORMANCE PLANNING

Ongoing Feedback

Ongoing Feedback

MANAGER

EMPLOYEE

PERFORMANCE REVIEW

MID-CYCLE REVIEW

OCTOBER - NOVEMBER

An informal one-on-one meeting between supervisors and employees to assess progress on previously established goals and objectives.

Performance Planning tool is used to record and monitor progress.

APRIL - MAY 31

The formal assessment of employee performance for the year based on previously established goals and performance criteria.

The Performance Planning tool is used throughout the process, beginning with:

- *self-assessment*
- *manager assessment*
- *one-on-one meeting*
- *2nd level manager review*
- *employee, manager and 2nd manager acknowledgment*

Ongoing Feedback

WHAT ARE THE NEW PERFORMANCE CRITERIA?

Duties, responsibilities and standards	Goals and objectives	Competencies	Behaviors	Professional Development Plans
Were the primary tasks and functions performed?	Were the established goals and objectives met?	Did your employee(s) apply the necessary knowledge, skills and abilities for the job? Have the competencies evolved?	Did your employee(s) demonstrate appropriate conduct?	Did employee(s) show initiative to attend workshops to help advance their career ?

The year-end review should reflect how your employee performed against each of these criteria.

CASCADING GOALS

Institutional Strategy and Goals
Vision, Mission, and Strategic Plan
Open and Clear Communication of Institutional Strategic Plan
and its Impact on Divisions/Schools/Departments

Division, School, and Department Strategies and Goals
Division/School/Department Plans and Objectives in Support of Institution Objectives
Open and Clear Communication of Divisional/Departmental Strategic Plan
and its Impact on Teams and Individuals

Individual and Team Goals

Individual and Team Goals

Individual and Team Goals

Performance goals should reflect individuals departmental, divisional and University needs.

DEFINING AND SETTING INDIVIDUAL SMART GOALS

S	**Specific**: Make goals precise and tangible to provide clear direction.
M	**Measurable**: Measure to manage. Establish concrete criteria for measuring progress toward each goal, such as quantity, quality, and cost.
A	**Achievable**: Choose a goal that is attainable given the current skill level, timeframe, and resources.
R	**Realistic**: Devise a plan that makes the goal reasonable
T	**Time-bound**: State the time for completion.

Checkpoint:

During what point of the performance process would you create SMART goals?

What tool would you use?

EXAMPLE: *CASCADING INDIVIDUAL SMART GOAL*

UNIVERSITY GOAL #5

Develop and manage human, financial, physical, and technological resources effectively, efficiently, and ethically to support the university's mission.

FINANCE & SUPPORT SERVICES (FSS) DIVISIONAL GOAL

Enhance our customer service focus by continuously reviewing our core processes and implementing new services.

TRANSPORTATION SERVICES DEPARTMENT GOAL

Transportation Services evaluates the parking permit structure in order to ensure expense coverage by establishing a committee that will make recommendations for adjusting fees and the budget by the end of the first quarter. Recommendations will consider three alternatives.

INDIVIDUAL SMART GOAL

Serve as a productive member of the Parking Structure Review Committee by providing informational and analytical support to the committee with final recommendations to be made by March 31st, 2016. Performance will be measured by meeting attendance, active participation and quality of information and analytics provided. Biweekly updates will be provided by 4pm on Friday to the Transportation Services Director.

Checkpoint:

Are your individual goals SMART?

Contact

E-mail
performancemgmt@txstate.edu

Website
www.hr.txstate.edu/performance-management.html

Fair Labor Standards Act (FLSA) Regulation Changes

Jeff Lund,
Manager, Compensation and Employee Relations

Fair Labor Standards Act (FLSA)

- Currently staff must be paid $23,664 (PG12) and perform duties to be exempt

- US Department of Labor asked by POTUS to review salary basis test for exemption

- Final regulations due from DOL in the Spring/Summer 2016

Proposed Changes to FLSA

- Salary basis test: $50,440
- Duties test is secondary
- Based on exempt employees' salary
- Decisions will be based on salary and job title
- Some exempt titles could become non-exempt
- Could impact over 100 titles

Impact

- Potential cost of new overtime
  - No new funds available for overtime
  - Time will need to be managed carefully (higher paid employees cost more for overtime)
  - Employee adjustment to being managed for hours worked
  - Possible legislative challenge coming

Questions

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Reimbursement Procedure for Academic Courses

Marsha Moore,
Director, Professional Development

Reimbursement is the name of the game - *waiver is no more*

New Process:

❖ Employee submits "Release Time and Reimbursement for Academic Courses Request Form"

- Form has a class schedule attached
- Form is signed by employee and department head
- Department head can approve release time, fees, and tuition separately
- Form is submitted to HR/PD by the 12th class day for current semester

❖ Employee must complete course with a passing grade of D or higher

- ❖ Refunds will be automatically processed within 30 business days by Student Business Services once grades are posted. Employee has no additional step to take once the approval form is submitted.

- ❖ Past due charges or balances for future term will be applied to the student's account prior to any refund submission to the student.

- ❖ Form will be located on the HR website.

- ❖ UPPS 04.04.35 will contain inaccurate information until formal review process is completed.

Next Steps:

- Personal notifications will be sent in the following order:
  - Employees enrolled for fall 2015 who missed 8/31/15 waiver date
  - Employees currently enrolled for spring 2016

- Each group above will be asked to submit form for verification of courses for which reimbursement is being requested

- University at large will be notified of procedure for upcoming semesters

- Staff Education Development Leaves will utilize a different form but the reimbursement process is the same

Questions

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TEXAS STATE

N.E.W.

NEW
EMPLOYEE
WELCOME

Marsha Moore,
Director, Professional Development

New Employee Welcome Transition

❖ Focus groups for both new hires and hiring managers

❖ Visits to Texas institutions of higher education with similar missions

❖ Information from nationally recognized programs

❖ Analysis of current program in comparison with current research

Change Begins on May 2, 2016

New Employee Welcome I:

- ❖ HR greeters to welcome and direct new employees

- ❖ More emphasis on culture and tradition

- ❖ Exercise on Texas State history

- ❖ Visual tour of campus from JCK 1100

- ❖ Welcome videos from President Trauth and current employees

New Employee Welcome II - May 13

❖ Introduction to another venue other than JCK – End Zone Complex

❖ Continuation of emphasis on culture, history, and traditions

❖ Shuttle bus tour of campus with Student Ambassador guide

❖ Glass bottom boat tour of Spring Lake

❖ Box lunches at conclusion

Additional Onboarding Upgrades

- ❖ Website for New Employees:
  www.hr.txstate.edu/New-Employee-Welcome.html

- ❖ Website for Hiring Manager

- ❖ Extension of onboarding process to intervals of first week, month, 3 months, 6 months, and year of employment

- ❖ Checklists for both employee and hiring manager

- ❖ Phase-in of new onboarding module tied to EASY System

- ❖ Online module(s) for mandatory information to be completed within 30 days of employment

Questions

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Website

www.hr.txstate.edu/New-Employee-Welcome.html

Sick Leave Donation to Individuals

Michelle Moritz, Associate Director, Human Resources

Sick Leave Donation to Individual

House Bill 1771, 84th Legislature, Regular Session, authorized individual employees to voluntarily donate sick leave hours to another employee.

This is in addition to the Sick Leave Pool.

Rules

- Recipient must work for the same agency

- Recipient must have exhausted all of their own sick leave including any hours the employee may be eligible to receive from the sick leave pool

- Donor may not accept any compensation or gift in exchange for the donated hours

Rules

- Hours may be donated in any increment with no minimum, maximum, or expiration date

- Donated sick leave hours can only come from the donor's accrued sick leave

- The donor can donate sick leave to more than one recipient

- Donated hours do not get returned to the donor if the recipient does not use them

- The effective date for donated hours must be on or after September 1, 2015, and before the donor's termination date

Medical Certification Required

- The value of donated sick leave may invoke tax consequences for the donor if the recipient's need for sick leave donation does not qualify as a medical emergency pursuant to IRS guidelines.

  For sick leave donation purposes, a medical emergency is defined as "a major illness or other medical condition that requires a prolonged absence from work, including intermittent absences that are related to the same illness or condition".

- Medical certification is required to determine if use qualifies under the IRS definition of "medical emergency". Human Resources will review and make this determination.

More Rules

- Donated hours can only be used for the certified medical illness or condition

- Donated hours may be used for the employee or family member as defined in the regular sick leave policy (UPPS 04.04.30)

- Medical certification must be submitted timely; hours may not be permitted retroactively

- Recipient can refuse to accept the hours

- Current department will be notified of hours accepted

…and more rules

- Donated sick leave cannot be transferred to another state agency

- Donated sick leave cannot be paid out to the estate if the recipient passes away

- Donated sick leave cannot be used towards retirement credit

- Donated sick hours must be recorded as lost when the recipient terminates. They cannot be transferred to the sick leave pool.

- If the recipient terminates and is rehired at the same agency where donated sick hours were lost, the hours cannot be reinstated

New Forms

- Sick Leave Donation to Individual – Donor
- Sick Leave Donation to Individual - Recipient

Updating 04.04.30 University Leave Policy

Contact for questions: Selma Selvera, ss24 or 5-2557

Questions

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Next HR Forum:
July 12, 2016