Amherst College
Office of Human Resources (OHR)

Supervisory Forum
March 7, 2019
Agenda

11:30 AM Welcome and Introductions
11:35 AM BIG Presentation Follow Up
11:55 AM HR Transformation Update
12:00 PM Colleague Resource Groups
12:10 PM Recognition and Rewards Update
12:15 PM PMP 2019 Changes
12:25 PM Goal Setting Training
12:55 PM Announcements/Reminders
1:00 PM Adjourn
BIG Presentation Follow Up
Table Discussion - Question #1
How could the work in my area benefit from what I understood or heard about BIG?
Table Discussion - Question #2
As someone who is in a leadership/supervisory position here at Amherst, what are some things I can do to help make this project a BIG success?
Big Feedback - Question #1
What did you find exciting about the BIG project?
BIG Feedback - Question #2
What are you concerned about?

- Change Management
- Timeline, Project Requirements, Support
- Trust, Engagement
- Managing Expectations
- Participation, Inclusion
- Customization, Integration
- Data Management
- Priorities, Policies
- Decision Making
- Staffing Changes
- Other
BIG Feedback - Question #3

What suggestions do you have to help this work meet its full potential?
BIG Presentation Follow Up Questions

1. As someone who is in a leadership/supervisory position, what are some things I can do to help make this project a BIG success?

- Champion Change
- Share and Receive Information
- Positivity, Excitement, Motivation
- Strategic Thinking
- Managing Expectations
- Team Player
- Participate in Discussions
- Listen to Staff Concerns
- Training
- Communication/
  Transparency
- Mindful/Flexible

➢ What tools will you need to make this happen?
BIG Presentation Follow Up Questions

2. What are you concerned about?

- Change Management
- Timeline, Project Requirements, Support
- Trust, Engagement
- Managing Expectations
- Participation, Inclusion
- Customization, Integration
- Data Management
- Priorities, Policies
- Decision Making
- Staffing Changes
- Other

➢ How can we support you?
Workday Platform Executive Overviews

Wednesday, March 13 or Thursday, March 14
8:30-10 a.m. - Stirn Auditorium

• Here’s what you can expect at the demos:
  – Specifically tailored to Amherst and will cover the functionality of Workday’s Human Resources, Finance and Student Services modules
  – Sessions are designed for a broad audience of both heavy and occasional users of these systems. Sessions will be videotaped and posted on the BIG website afterwards
  – Workday will also be conducting targeted and more technical sessions for specific workflow scenarios, reports, and various user interfaces for HR, Payroll, Finance, and Student Services.
HR Transformation Update
HR Transformation Update

• Completed an extensive process mapping process, identified areas where we can gain efficiencies and implemented changes: communications, benefits, recruitment/hiring
• Through post staff survey work, we are implementing changes in key areas of improvement identified in our initial assessment: Training, Recognition, PMP
• We are making progress towards the completion of our first OHR Strategic Plan, with a focus on transforming the HR organization into a more strategic/consultative function
• In partnership with Finance and IT, and through the BIG initiative, working on setting the stage for the transition to a new ERP
• Transition of transactional work to a new shared services center
• New positions and organizational changes
<table>
<thead>
<tr>
<th>Transactional Services</th>
<th>Strategic Services</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>HR Assistant</strong></td>
<td><strong>Employee Relations</strong></td>
</tr>
<tr>
<td>- Intake</td>
<td>- Employee relations</td>
</tr>
<tr>
<td>- Triage</td>
<td>- Conflict resolution</td>
</tr>
<tr>
<td>- Escalation</td>
<td>- Mediation</td>
</tr>
<tr>
<td>- Document production</td>
<td>- Coaching</td>
</tr>
<tr>
<td>- Probationary review tracking</td>
<td>- Performance management</td>
</tr>
<tr>
<td>- Office management</td>
<td>- Probationary reviews</td>
</tr>
<tr>
<td>- Leaves administration</td>
<td>- Training</td>
</tr>
<tr>
<td>- Benefits enrollment</td>
<td>- Consultation</td>
</tr>
<tr>
<td>- Workers Comp.</td>
<td>- Organizational planning, including success planning</td>
</tr>
<tr>
<td>- HR Analytics</td>
<td>- Training</td>
</tr>
<tr>
<td>- Salary &amp; benefits transactions</td>
<td>- Leadership development</td>
</tr>
<tr>
<td>- Reporting</td>
<td>- Staff development</td>
</tr>
<tr>
<td>- Onboarding</td>
<td>- Consultation</td>
</tr>
<tr>
<td>- Visa processing</td>
<td>- Employee experience</td>
</tr>
<tr>
<td>- Recruitment transactions</td>
<td>- Communications</td>
</tr>
<tr>
<td>- Hiring transactions</td>
<td>- Events coordination</td>
</tr>
<tr>
<td>- Casual employment</td>
<td>- Recognition</td>
</tr>
</tbody>
</table>

| **HR Services**        | **Organizational Development & Engagement** |
| - Intake               | - Organizational planning, including succession planning |
| - Triage               | - Training |
| - Escalation           | - Leadership development |
| - Document production  | - Staff development |
| - Probationary review tracking | - Consultation |
| - Office management    | - Employee experience |
| - Leaves administration| - Communications |
| - Benefits enrollment  | - Events coordination |
| - Workers Comp.        | - Recognition |

| **Strategic Services** | **Talent Acquisition** |
| - Hiring strategy      | - Recruitment efforts |
| - Recruitment efforts  | - Search committee support |
| - Classification and compensation management | - Job descriptions |
| - Position management  | - Diversity & inclusion efforts |
| - Transaction management | - Exit interviews |
| - Retention strategies | - Training |
| - Workforce planning   | - Consultation |

| **Compensation, Benefits & HRIS** | **Strategic Services** |
| - Compensation and benefits strategies | - Organizational planning, including succession planning |
| - Benefits communications | - Training |
| - Classification and compensation management | - Leadership development |
| - Transaction management | - Staff development |
| - Retention strategies | - Consultation |
| - Workforce planning | - Exit interviews |
| - HR Systems            | - Training |
| - Training              | - Consultation |

**OHR New Organization – 01/01/19**
CRGs Update
Colleague Resource Groups (CRG)

Mission
The mission of CRGs is to create an affirming gathering space for all staff and faculty interested in sharing identities, experiences and/or interests.* CRGs will support the College’s efforts to build community, transform our culture, and connect to and achieve its mission. They will also support efforts towards the inclusion of historically marginalized communities.

*The College will not endorse any group that forms on the basis of practices that discriminate against protected classes, in accordance with its non-discrimination policy.
Colleague Resource Groups (CRG)

Benefits of CRGs

• Stronger sense of belonging, particularly for people from historically marginalized backgrounds
• A way for employees to feel more connected to each other and the College in general
• Cross-college collaboration / community building
• Leadership development opportunities
• Many institutions’ survey data indicates employees involved in CRGs have higher engagement scores
• Research continues to demonstrate positive correlation between employee engagement, productivity and retention
Colleague Resource Groups (CRG)

Pilot CRGs, March - June 2019

• First generation
• Gaming
• Latinx
• LGBTIQ+
• Outdoor activities
• People of Color
Colleague Resource Groups (CRG)

Supervisors/chairs can support this pilot program by

• Communicating the importance of CRGs as opportunities for staff and faculty engagement, inclusion, and enhancing the overall work experience

• Facilitating time for community members to participate

Questions?

Please email Dina and Maria-Judith with your questions, comments or suggestions at CRGs@amherst.edu
Recognition and Rewards Update
## Recognition and Rewards: Amherst Appreciations Stats

<table>
<thead>
<tr>
<th>Recognition Category</th>
<th>Nov-Dec 2018</th>
<th>Jan</th>
<th>Feb</th>
<th>As of Mar 6</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spot Awards</td>
<td>35</td>
<td>17</td>
<td>14</td>
<td>3</td>
</tr>
<tr>
<td>Staff Shout-Out</td>
<td>149</td>
<td>58</td>
<td>52</td>
<td>18</td>
</tr>
</tbody>
</table>
PMP 2019 Changes
**Performance Management Process (PMP) - 2019 Changes**

<table>
<thead>
<tr>
<th>Program Component</th>
<th>Former PMP (2018)</th>
<th>Changes to PMP for 2019</th>
</tr>
</thead>
</table>
| **Self-evaluation** | • Staff members were asked to provide a rating for their performance.  
• Self-evaluation process was lengthy and included 12 distinct areas in which to provide feedback for the self-evaluation. | • Staff members do NOT provide a rating for their performance.  
• A new streamlined process includes only four simple questions focused on major accomplishments, unexpected barriers to meeting goals, growth and development activities, and suggestions for support in achieving goals and objectives. |
| **Goal-setting** | • Prior process for goal-setting included a detailed set of guidelines and requirements linked to a number of categories. | • The new simplified goal-setting process is more streamlined, and includes three areas of focus to inform goals: execution against core job duties, specific individual goals and projects (optional), and professional or career development goals (optional). |
| **Mid-year check-in** | • No formal process existed for encouraging ongoing dialogue on progress toward goals and performance during the evaluation cycle. | • The new process provides for an informal mid-year check-in for the staff member and supervisor to touch base on goals and progress to date, and make modifications as appropriate. |

*The Performance Management Process (PMP) Working Group is pleased to introduce the first set of improvements made to the process, effective March 2019. There are more to come, and it is our hope that these immediate changes make the goal-setting and evaluation process simpler, quicker, easier to navigate and more meaningful for supervisors and staff.*
New Self-Evaluation Questions

1. What did you accomplish during this evaluation period? What do you think you did best? What are you most proud of?

   • *Tip: Think about ways in which you have completed your daily tasks, special projects you worked on, additional contributions you have made, etc.*

2. Describe any challenges or barriers that affected your ability to meet objectives or goals during the evaluation period.

   • *Tip: Consider unexpected developments, changes in plans or deadlines, shifts in division, department or College priorities, etc.*

3. Please share any examples of growth and development during the evaluation period.

   • *Tip: List knowledge or skills learned or advanced, training and development activities attended, committee work, on-the-job training or collaboration with others that resulted in learning, etc.*

4. What objectives and goals would you like to accomplish during the coming evaluation period? What would help you achieve them? Note that this will help you and your supervisor determine goals for the coming year.

   • *Tip: Include training in areas that will enhance your knowledge and skillset, educational opportunities, clarification of job duties or expectations, opportunities to collaborate with others, new technology, better communication, etc.*
Goal Setting

1. All staff members are expected to execute against their core job duties and responsibilities to the best of their abilities.

2. Identify department goals and/or objectives (1-5 items) for the coming year using the SMART criteria (Specific, Measurable, Achievable, Relevant, Trackable). Employees can also identify additional goals they would like to include, as well as opportunities for growth and development.
OPM Enhancements/Reminders

- We continue to enhance the ability to update employees and supervisors. The turn around time will be the same day.

- The data will be frozen as of April 1, 2019, with the exception of employees that terminate throughout the evaluation process.

- Employees are provided with two weeks to submit their self-evaluation.

- Supervisors can start working on their evaluations and save them as DRAFT until the self-evaluation period is completed.

- Department Heads and Senior Managers now have the ability to add comments to the evaluations.
REMINDER

Performance Evaluation Period:

April 1, 2018 – March 31, 2019
Goal Setting Training
Goal Setting

What is the purpose of goal setting?
Goal Setting

What challenges or questions do you experience when setting goals with your staff?
Goal Setting

**Performance Planning**
Dialogue between a supervisor and employee to establish clear, specific, performance expectations at the beginning of the performance cycle.

**Performance Review, Evaluation and Development**
Summative two-way discussion and written documentation focusing on employee performance: areas of excellence; progress on workplace priorities; goals for improvement; and development needs.

**Performance Coaching, Feedback, and Documentation**
Regular two-way discussions between a supervisor and employee focusing on work progress and quality. It also involves regularly observing, monitoring, and documenting performance throughout the year.
Goal Setting Conversations

Purpose
• Have a dialogue that focuses the employee on exactly what needs to be done and by when.
• Start the process by setting the person up for success, growth and development.
• The goal becomes the center of future check-in meetings and conversations.

Goal Setting – What am I supposed to be doing
• creates clear and compelling goals (both people agree to the goal)
• written down
• goals provide opportunity to successfully achieve the tasks
• focus the employee on exactly what needs to be done by when
• done at the beginning of a project or goal
• reviewed regularly

Adapted from First Time Manager by the Ken Blanchard Company.
Goal Setting

To set effective goals, it is important to identify **SMART** goals ...

- **S** Specific … one goal at a time
- **M** Measurable … in time and quantity
- **A** Achievable … reasonable, but also a stretch
- **R** Relevant … makes a positive difference
- **T** Trackable … allows monitoring of progress

*A goal is a dream with a deadline.*
Napoleon Hill

Adapted from *First Time Manager* by the Ken Blanchard Company.
Goal Setting

Two types of questions are helpful when setting goals:

• **Clear** – defines the goal and the expected outcomes (the results)

• **Compelling** – explores how committed the person is (motivation)

Adapted from *First Time Manager* by the Ken Blanchard Company.
Goal Setting Practices

1. Limit the number of goals to 3-5 to prevent “diffusion of energy”
2. If you set 2-3 goals, usually you complete 2-3 objectives
3. If you set more than 3, you usually complete less than 3
4. Hard (“stretch”) goals are more engaging than easy (“soft”) goals
5. Stretch goals tell the employee that their work is valuable, their contribution is important to our success
6. Key is to find the appropriate amount of stretch, the tension point
7. Let the employee know that by setting a real stretch goal, it will not be held against them if they are not completely successful
8. Work collaboratively to set goals and write them down

Adapted from *First Time Manager* by the Ken Blanchard Company.
Goal Setting Practices

- 43% successfully achieve their goals if they think about them and nothing more.

- 64% successfully achieve their goals by writing them down and sharing them.

- 76% successfully achieve their goals by writing them down, sharing them, and checking in weekly.

Adapted from First Time Manager by the Ken Blanchard Company.
Announcements/Reminders
Upcoming OHR Training Sessions

• Discover the Lost Art of Concentration – March 8 & 22
• Understanding and Eradicating Microaggressions – March 12
• How to Complete the New Online Self-Evaluation – March 14 & 19
• Actualize Your Goals – March 20, 27 & April 3
• Goal Setting and Giving Performance Feedback – March 28 & April 23
• Creating and Maintaining High Performing Teams – March 26 & April 9
• Project Management – April 2

Please contact Stephen Butler at x2521 or sdbutler@Amherst.edu to schedule any of these trainings for your team or department.
Recent and Upcoming OD Sessions for Departments

- **Admissions** – PMP Review and Discussion of the Ratings
- **Custodial Department** – Review the new Self-Evaluation and *Make a Difference* Behaviors
- **Facilities Operations** – Performance Management and Conducting Effective Performance Evaluations
- **Residential Life** – Managing Change and Transitions
- **Spanish Department** – Planning Curriculum Reform

Please contact Stephen Butler at x2521 or sdbutler@Amherst.edu to schedule any of these trainings for your team or department.
Save the Date!

Amherst & You – A Welcome Event for New Employees

• Wednesday, April 10
• Thursday, June 13
• Wednesday, August 14

Next Supervisory Forum

May 16, 2019
Future Meetings

Let us know what you want to know!
Questions?
Thank you for your participation!