

January 13, 2010

TO: President Peter Gilkey and Members of the University Senate

FROM: Linda King, Associate Vice President for Human Resources

SUBJECT: Status Report on Officer of Administration Employment Policy Review

This memo provides the status of the Officer of Administration (OA) employment policy review for the January 13, 2010 meeting of the University Senate.

The OA policy initiative was launched in 2007 with the goal of comprehensively reviewing OA personnel policies. More information about the initiative, including its purpose and scope, can be found on the OA webpage on the Human Resources website: <http://hr.uoregon.edu/oa/>. Early activities included an extensive information-gathering effort to better understand the perspectives and concerns of officers of administration and vice presidential leadership groups. Using this information as a base, an "Objectives and Timelines" document (also available on the website) was developed to outline the steps of the project.

A steering committee was established to provide advice and oversight for the initiative. Membership includes:

Linda King, Associate Vice President for Human Resources, *chair*
Penny Daugherty, Director of Office of Affirmative Action & Equal Opportunity
Shelley Elliott, OA Council representative
Renee Irvin, Coordinator of Finance and Operations, Architecture and Allied Arts, *currently on leave*
Moiria Kiltie, Assistant Vice President for Research
Sonia Potter, Administrative Director of Personnel and Budget, Unclassified Personnel Services
Kathie Stanley, Chief of Staff, Office of the Vice President, Student Affairs
Beverlee Stilwell, Assistant Vice President, Office of Senior Vice President and Provost, *new appointment*
Greg Stripp, Associate Vice President of Planning and Administration, Office of University Relations
Russ Tomlin, Vice Provost for Academic Affairs

Kim Holland-Turley in Human Resources was hired in August 2009 in an interim capacity to provide staff support to the initiative.

Members of the steering committee and Human Resources staff formed subcommittees to work on the tasks outlined in the “Objectives and Timelines” document. Progress on each step is outlined below:

Policy Framework

- A comprehensive list of 85 current policies and practices that pertain to OA employment was created and posted on the website listed above. Intended to provide policy information in an accessible, “one-stop” location, the list is grouped alphabetically by employment activity and is also searchable.
- An “OA Policy Forum” has been created on the Human Resources website listed above. This forum provides the opportunity for OAs and other members of the university community to review and comment on proposed policies and procedures. It was first used on the Professional Development and Training Policy. Future policy or procedural proposals will be posted for comment.

Roles and Responsibilities for Policy Administration

- Key to creating consistent and effective policy administration is assigning responsibility and dedicating staff to OA employment. In July 2009, Human Resources was named as the office responsible for OA employment and policy administration, working in collaboration with the other university offices that have responsibility for aspects of unclassified employment.
- A new position, Associate Human Resources Director for OA Employment, was authorized and funded last August. A search is currently underway with campus visits for semi-finalists planned in January.
- Temporary staff assistance (Kim Holland-Turley) was funded and retained in August to provide additional support for the initiative.

Performance Appraisal

- A policy on OA performance management has been drafted and will be shared on the “OA Policy Forum” described above. It requires annual reviews and specific elements as part of the reviews (e.g., professional development plans and goal setting). Preliminary consultation with university leadership indicates support for requiring annual appraisals.
- Considerable progress has been made in creating a system to track completion of OA performance appraisals using Banner and the effort is currently in the testing phase of the new tracking system. This tracking is an essential first step to creating consistent practices regarding annual reviews for all OAs by enabling follow-up with OA supervisors who do not complete annual reviews.
- Colleges, schools and administrative units were surveyed to better understand and solicit input on current and proposed performance review practices.
- Revised formats and instructions for conducting OA performance reviews are in the draft stage and will accompany the new policy.

Grievance/Appeal Process

- This subcommittee has reviewed the university’s obligations under OUS administrative rules that must be met in creating a new or revised grievance or appeal process. The next step is to recommend new processes within this framework.

- Creation of an informal dispute-resolution process is being drafted in response to OAs' desire to have concerns heard and addressed.

Professional Development

- A revised policy on professional development and training has been submitted to the university's policy-setting process. It was posted on the OA policy forum website. The new policy includes more defined guidelines for implementing the policy at all levels of the organization and integrates responsibility for professional development at each level of the organization.
- New programs and offerings that promote the professional development of OAs and others have been developed and presented:
 - *Financial Stewardship Institute*
 - Skillsoft eLearning
 - Greg Bell presentation to OAs on "Thriving in Turbulent Times", an opportunity presented at the request of and in collaboration with the OA Council

Flexibility in Work for Personal/Family Reasons

- The current telecommuting policy is not responsive to the needs of OAs and other university employees for flexibility in work schedules and telecommuting arrangements, particularly for personal or family reasons. A new policy has been drafted that provides a framework for exploring and implementing flexible work practices that promote improved employee performance not only through reduced commuting miles, but also by furnishing greater balance in employees' work, educational, personal life and family responsibilities. This policy will be posted for comment on the OA policy forum described above.

Compensation

- A subcommittee of the steering committee (composed of Penny Daugherty, Sonia Potter, Renee Irvin, Greg Stripp, and Linda King) is reviewing OA salaries by employment category as background for developing compensation policies and practices that reflect the dual needs for consistency and flexibility.

Upcoming work:

The remaining steps in the policy initiative's objectives and timeline include, but are not limited to, work on OA contracts (specifically timely notice provisions), leave policies (including the unearned sick leave advance), which will be launched in early 2010.