

# LASER.

Lehigh All-Staff Employment Rewards

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## Compass Update



A year ago, HR announced the beginning of the *Job Family Compass (JFC)* project with a letter to Lehigh staff. The project was created in response to a significant finding that emerged from the staff focus groups conducted in the fall 2003 semester. The focus groups indicated that staff members perceived limited career growth at Lehigh with no clear way to progress in one's career. How individuals can develop at Lehigh, either through increasing knowledge and skills in their current role or by moving to other jobs at the university, remained unclear to most staff members. The JFC project team's challenge was to address this important concern.

*Compass* also addresses an essential business challenge. One of Lehigh's strategic goals is to continue to increase its standing among the finest institutions in the world by establishing a culture of development and increasing the capabilities of Lehigh staff. The information and tools developed during the *Compass* initiative support an environment in which employees are encouraged to learn and grow, to increase their contribution to the organization, and to remain competitive overall.

### Compass Activity

*The process will be simple:*

The first year of the *Compass* project has been very productive. Eight of twenty-four job families have completed their *Compass Guides* and four are in the process of developing their guides. At the end of March, the following statistics reveal the level of activity surrounding *Compass*:

#### Classified Staff:

- ▶ Number of employees completed: 610 (62.3%)
- ▶ Number of employees in process: 148 (15.1%)
- ▶ Number of employees remaining: 228 (23.3%)

#### Compass Process:

- ▶ Initial Focus Groups: 40
- ▶ Validation Sessions: 35
- ▶ *Job Family Compass* Orientation Sessions: 35

#### Other Compass Activities:

- ▶ Advisory Committee Meetings: 5
- ▶ Issues of *LASER*: 4
- ▶ *Spotlight* Updates: 10

Before employees were invited to attend any session, the *Compass* team developed the process, the tools, and the communication channels. The *Compass* tools include:

- ▶ *Accountability and Skill Guide*
- ▶ *Staff Development Resource Guide*
- ▶ *Individual Development Plan*
- ▶ *Orientation sessions for managers and staff.*

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## Compass Update continued

The response from employees has been largely positive. Many are excited to have such a complete resource to help them understand their own positions as well as the roles of other positions within their job family and across the university. Many welcome the clarification of responsibilities (accountabilities) and a clear statement of behavioral expectations (success factors). If individuals are interested in development, most of the information needed to plan for change is in the *Compass Guide*.

Managers have an additional responsibility. Not only is *Compass* a resource for them as individual employees, it is also a tool to use in managing staff and achieving important goals and objectives for their department. *Compass* supports three of the managerial success factors: setting a strategic vision; fostering a learning environment; and coaching staff for excellent performance. Managers may reinforce the *Compass* program during staff meetings by encouraging staff to be involved in the job family development process and by following up to ensure that each employee has an *Individual Development Plan*.

The individual development plans form the basis for a group, team, or department plan to ensure that the skills needed to achieve strategic objectives are available in the short term and the long term. One of the business reasons for *Compass* is that by cultivating and rewarding employee development, excellence will follow. The challenge for Lehigh's managers (and managers everywhere) is to channel the knowledge, skills, and abilities within the workforce to achieve and sustain excellence. Our primary hope is that managers at Lehigh have the necessary tools, resources, and support to accomplish this.

### Advisory Committee Members

Job Family Represented	Staff Member	E-mail	Extension	Department
Administrative Services	Mary Pat DeJarnette	mad6	84788	Goodman Center
Administrative Services	Dorothy DeMasi	mdd0	84251	Environmental Health & Safety
Administrative Services	Erica Nastasi	en03	83810	Sociology and Anthropology
Athletics	Cleveland McCray	cjm2	84413	Athletics
Development/Fund Raising	Karla Morales	kam4	85958	Development Office
Development/Fund Raising	Sharon Upton	slu2	86166	Development Office
ERAC	Melanie McDonnell	marj	85530	Enterprise Systems Implementation
Finance/Accounting	Amy McCrae	alm2	83247	Lehigh Support
Higher Education Administration	Vivien Steele	vls1	83314	English
Information Technology	Jason Slipp	jqs7	85343	LTS Client Services
Information Technology	George Yeh	gey2	83160	Bursars Office
Library	Brian Simboli	brs4	85503	LTS Client Services
Marketing/Communication	Stephen Oblas	sjo3	83018	Internet Services
Performing Arts	Jacob Campbell	jaca	85453	Zoellner Arts Center
Police	Robert Bruneio	rsb5	84200	University Police
Research/Administration	Ruth Tallman	rt01	83024	Office of Research & Sponsored Programs
Student Life	Thomas Dubreuil	trd2	86598	DOS – Residence Life
Technical/Scientific	Daniel Zeroka	dmz3	83542	Civil and Environmental Engineering
Trades	Wilfredo Colon	wic2	85108	Facilities Services

# Roles Involved in Career Management

In the March 2006 *Spotlight* we discussed the different kinds of developmental pay at Lehigh. Let's discuss further the roles of staff members and supervisors in developmental pay and career management at Lehigh.

## **The Staff Member's Role**

Each staff member assumes primary responsibility for managing his or her own career planning and personal development. Development is fueled by your own ability and desire to grow.

You are responsible for your own self-assessment of your current career status, knowledge and skills, mobility, accomplishments, and progress as a starting basis for determining individual career goals. Assess your own personal interests, define personal success for you, and determine your own willingness to provide the investment of time, effort, and mobility needed to succeed, evaluate alternatives, and develop a timetable. You are ultimately responsible for seeking information on what job or training is available, where it is available, and what training paths are necessary to obtain goals.

Learn the importance of development for each position that you hold. This development is important for two reasons. You will want to:

1. Build a successful track record – growth must be visible in job accomplishments.
2. Master your current job responsibilities and strive to raise performance of these responsibilities to an above-average level. Don't become so engrossed in preparing for some future job assignment that you cease to perform effectively in your current job.

Drawing upon a variety of experiences will widen your perspective and apply a comprehensive outlook to later jobs. Look upon your current job as a building block for later opportunities.

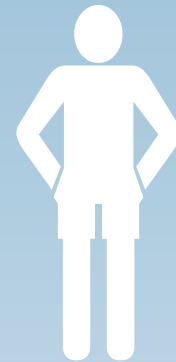
## **The Supervisor's and Staff Member's Role"**

It's helpful to remember that any type of employment change doesn't just happen overnight. You may be tempted to focus immediately on advancement and not on the changes necessary to prepare to play a more responsible role within your current position. You and your supervisor will discuss what the department's needs are in relation to your own professional development and career aspirations. This process involves five different elements:

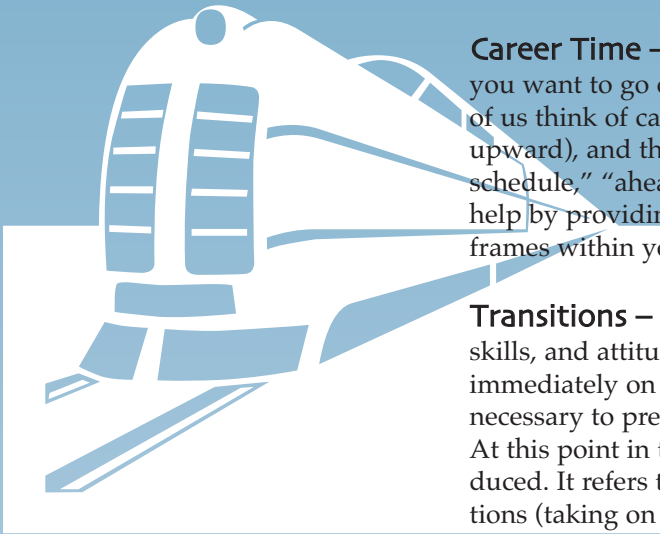
**Direction** – This involves career goals. Goal setting has two components. First, what the employee is able and wants to do, which consists of knowledge, interests, and needs. The second component is what the department or organization needs to have done. Goal setting focuses on both components through self-assessment if in current role and organizational/departmental assessment for other roles. Self-assessment refers to your staff role, relationships, personal attributes, personal limitations, and job identification.

Organizational or departmental assessment refers to the boundaries that are set by the department and Lehigh that influence your perception of available alternatives and the extent to which personal aspirations are realistic and timely.

Boundaries include the hierarchy or levels in an organization, the function of your department, the degree to which you are identified with a particular group or specialty, and your supervisor's insights. Any combination of these



factors and the norms of the organization may lead you to feel “boxed in” or frustrated. So, you must weigh the impact of organizational goals and values on your plans. You may want to review the article in this issue of *LASER* about the *Individual Development Plan (IDP)*.



**Career Time** – This relates to distance and speed factors, that is, how far you want to go on the career path and how fast you expect to get there. Most of us think of career progress in terms of time, the distance we travel (typically upward), and the speed of advancement. You gauge progress as being “on schedule,” “ahead of schedule,” or “behind schedule.” Your supervisor may help by providing feedback as to whether or not these are reasonable time-frames within your department.

**Transitions** – Transitions relate to the changes expected (in knowledge, skills, and attitudes) en route to a career goal. You may be inclined to focus immediately on advancement and salary increases and not on the changes necessary to prepare yourself to play a more responsible role within Lehigh. At this point in the career planning process, the notion of investment is introduced. It refers to what price you are prepared to pay in order to change positions (taking on more responsibility, more energy output, more time, and perhaps more money spent to prepare for a new position). It also concerns the degree of certainty that you will be happy and satisfied in the new assignment. There are people who ultimately learn to perform well in their new positions but, if they are absolutely honest with themselves, they may discover that the new role does not completely match their expectations.

Transitions involve the most thinking and planning. Setting goals and a timetable only initiates the career planning process. The transition factors are considered and analyzed in detail. Because it is very difficult to be absolutely objective about yourself, you require both information and feedback from others (supervisors, mentors, friends, and family) in order to calculate the transitions involved.

**Career Planning Options** – Many employees are unaware of all the options available to them for professional development/career management or reaching career goals:

- ▶ **Advancement** – Moving to a position with a grade (which is the option to which most aspire)
- ▶ **Lateral** – Moving across functions to develop new skills or as a way to reach a career goal when one career path dead-ends
- ▶ **Change to lower grade** – This may also be used for development or career goal attainment. Some individuals choose to take a step back to diversify their skills and job knowledge in order to move forward – an investment in future growth. A change to a lower grade may result in a loss of pay at first, but ultimately may lead to future career growth.
- ▶ **Job enrichment** – For various reasons, a staff member may not desire advancement (he or she likes the present position or location). Career goals for such a person may be working toward greater accountability and variety in the present position, which requires use of enhanced knowledge or abilities. Accomplishment of these goals results from high motivation and provides personal growth. Where business needs and departmental structure allow, supervisors may be able to facilitate job enrichment by restructuring jobs or shifting duties.
- ▶ **Exploratory research** – Actively investigating other options or taking temporary special projects or assignments to explore a new area are forms of exploratory research.

**Projected Outcome** – This relates to the probabilities that your investments and sacrifices for career progress will pay off. When considering predicted or actual outcomes, you will calculate the risks attached to the various actions in the career plan. When attempting to predict outcome, seek feedback from colleagues and leadership to reinforce your understanding of the organization.

As you think about your professional development and career changes at Lehigh, keep these guidelines in mind:

▶▶ **For staff members:**

- ▶ Make professional development/career management an ongoing process
- ▶ Work out agreements between you and your supervisor about what is expected – performance outcomes, results, achievements, etc.
- ▶ Seek opportunities and training programs to learn new skills and build or develop existing skills.

▶▶ **For supervisors:**

- ▶ Identify compelling business needs and discuss them with your staff to help them understand why workplace learning and performance are critical for Lehigh’s success – now and in the future
- ▶ Make a personal commitment to help your staff members grow
- ▶ Keep your staff members informed as to how they are doing in their current job – feedback is essential in any kind of development
- ▶ Stay current with alternatives available at Lehigh for helping your staff members develop, such as special assignments, coaching, and formal training
- ▶ Provide a supportive atmosphere.

If you have questions about career management at Lehigh or are interested in learning more about your own individual career path, talk to your supervisor or contact Human Resources.

## Where to go for more information...

The members of the project team for the *Job Family Compass* include:

- ✓ Rebecca Bowen ([rab6@lehigh.edu](mailto:rab6@lehigh.edu)) extension 83897
- ✓ Ronnie Hesch ([vah0@lehigh.edu](mailto:vah0@lehigh.edu)) extension 85020
- ✓ Jackie Matthews ([jamh@lehigh.edu](mailto:jamh@lehigh.edu)) extension 85657
- ✓ Mary Jo McNulty ([mjd4@lehigh.edu](mailto:mjd4@lehigh.edu)) extension 83894
- ✓ Linda Parks ([linda.parks@lehigh.edu](mailto:linda.parks@lehigh.edu)) extension 85195
- ✓ Alice Sikorski ([ams404@lehigh.edu](mailto:ams404@lehigh.edu)) extension 82789

You will also be able to go to the *Campus* Portal and select the “Employee” tab to see more information about the *Job Family Compass*. The Portal will also continue to house information on the staff compensation program.

**Compass Chronicles:**

# True Tales of Promotion and Transfer at Lehigh

*Long before there was the Staff Employment Value Strategy (SEVS), LASER, or Compass, Human Resources received feedback from staff that opportunities for advancement at Lehigh were limited. This feedback, confirmed by later focus group discussions, prompted the statement in the SEVS, "Career opportunities for employees who are ready, willing, and able to expand the scope of their responsibilities and increase their contribution to their department, college, and the University" and is the backbone of the Compass project. In 2005, twenty-five percent of open classified exempt and nonexempt positions were filled by internal candidates. Following are the stories of four individuals who were promoted or made a lateral move to another position.*

**Transfer to New Job Family**

Pam Gescek has worked at Lehigh for 25 years; for 15 of those years she was an Administrative Coordinator in the Athletics department. During the time in Athletics, Pam said her job evolved but she wanted to experience working in a new department - an academic department. She also wanted to learn new skills. Last fall, after several months of seeking other positions on campus, Pam made the leap to the academic environment she had hoped for. She is now the Accounting Coordinator in the Physics department and is truly enjoying her new role.

I asked Pam about her transfer experience. When Pam decided she wanted to move to another position at Lehigh, she updated her resume and started looking at the job postings on the Lehigh University (LU) employment Website. When a position piqued her interest, Pam followed the internal process for nonexempt employment. The first time she applied for a posted position, she sent Human Resources (HR) her resume with a cover letter and completed the internal application. Pam was tested on several software packages and met with an HR representative. Pam told me the testing was okay and that HR was helpful.

When Pam was interested in posted positions after the initial application process, she contacted HR via email to express her interest in a newly posted position. Pam informed her supervisor of her choice to search for another position on campus and expressed her interest in working in an academic environment. Pam said her supervisor was receptive and worked closely with her throughout the process.

When Pam saw the job posting for the Accounting Coordinator position in Physics, she researched the department by looking at the Physics' Website. She interviewed with three people in the Physics department and followed up to the interviews with written and email thank you notes. Pam periodically kept in touch with the hiring supervisor in the weeks between the interviews and when the hiring decision was ultimately made. One of Pam's major concerns was that her salary would be a problem given her 25 years of Lehigh experience - but it did not present a problem. Pam stayed at the same job grade but made the change from the Administrative Services job family to the Finance/Accounting job family. Her change has been positive.

**Promotion to New Job Family**

Matt Mattern joined Lehigh University two years ago as a Program Development Officer in the Vice Provost for Research area. Matt thoroughly enjoyed his job. One day, after approximately one and one half years at Lehigh, Matt got a call from a colleague. The colleague mentioned an open Development Officer position in Advancement. Matt understood the potential for career growth in Advancement. He quickly updated his resume and applied for the Development Officer position by sending the resume with a cover letter directly to the hiring supervisor in Advancement (as per the exempt hiring process). Matt was quick to tell his supervisor about his interest in the other position. Matt told me his supervisor is the type of person who wants people to succeed, and therefore was supportive of Matt's interest in the Development Officer position.

Matt researched the open position by contacting the hiring supervisor and asking questions about the job. He also spoke with contacts he knew in Advancement to learn more about the job and the work environment. Matt was pleased when he was asked to interview for the position in Advancement. An interesting scenario emerged given that Matt's supervisor in the VP for Research area was someone the interviewers in Advancement planned to involve in the search process. The process involved first and second interviews. On the first day there were multiple interviews; then a call back for one more interview at a later date. As is standard practice, Matt was expected to provide references. Matt's supervisor provided an oral reference and he had written references from his previous employers.

The end of Matt's story is a positive one. He has been a Development Officer in Advancement for several months now and enjoys his new role. Matt moved to a new salary grade and a new job family.

### **Promotion in same Job Family**

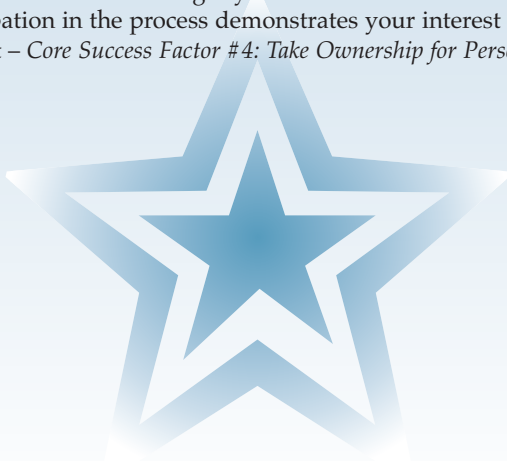
Trisha Alexy's story is very different from those mentioned earlier. Like Matt, Trisha was not looking at the job postings on the Lehigh Website. The position Trisha currently holds was never posted. University policy # 104 Exemption From Posting states, "If an employee from the same department is promoted into the vacancy, the position does not have to be posted." Trisha had experienced the many facets of the Iacocca Institute, first as a wage employee and then as the Career Awareness Program (CAP) Program Administrator. Trisha knew an Iacocca Institute colleague was looking for a position outside of Lehigh, so she was not surprised when the Institute director inquired about her interest in the Manager position. Trisha's immediate response was, "Yes, I am ready for this opportunity." Trisha recognized that her supervisor had prepared a succession plan. Trisha's willingness to take on whatever came her way paid off in the form of additional responsibility and promotion within her department. She is already preparing for future opportunities and has enrolled in the College of Education's Master's program for Educational Leadership.

### **Promotion in same Job Family**

Vanessa Gomez was looking to make a change in her career. She had worked for the College of Education's Transition and Assessment Program for almost three years and needed to make a change in her career. She wanted a job that provided new challenges and offered her experience in an administrative area of Lehigh. Vanessa updated her resume and worked with Lori Claudio in HR through the same process described in Pam's story. Vanessa told me her search took a total of ten months. Initially, Vanessa chose not to tell her management team that she had initiated an internal job search but elected to do so after a few months. The reaction Vanessa received from her supervisors was a mix of emotions. They were surprised at first and expressed disappointment in the possibility of losing her, but at the same time they understood her reasons for wanting to make a change and were happy she was planning to stay at Lehigh.

One day Vanessa saw a posting for a new position in Advancement. Vanessa researched the position and the culture of Advancement by talking to people on campus. Vanessa looked to her fellow colleagues for some guidance in helping her with her decision to transfer to other areas. Vanessa had previously tested (MS Word, Excel, and Access) and interviewed in HR, so the next step was to interview in the department. She interviewed with two people in Advancement. Vanessa's transition to a new role at Lehigh fulfilled two of her three goals. She moved to a new salary grade and is now working in an administrative area. Her third goal was to move to a new job family. Vanessa has made this a goal for the future.

In the scenarios described above, the employees had either not been through the *Compass* project or have since participated in the project following the transition to their new area or job family. The *Compass Guide* provides a wealth of information for employees whether or not they are looking to make a change. Much of the information that Pam, Matt, and Vanessa researched on their own is available in a *Compass Guide* for completed job families. Employees are able to access completed *Compass Guides* on the *Campus* Portal via the "Employee" tab. If your job family has not yet participated in the *Compass* project (see schedule on page 12), Human Resources encourages your involvement when that time arrives. Your participation in the process demonstrates your interest in learning and job development – *Core Success Factor #4: Take Ownership for Personal Learning and Development*,



## Compass Tools:

# The Individual Development Plan (IDP)

Prior LASER editions have focused on clarifying work accountabilities, defined and explained how to use success factors, and described how the new programs will be integrated into the workplace at Lehigh. Now we turn our attention to another Compass goal: "Present clear development and career paths to help staff manage their careers at Lehigh." This article highlights one of the tools developed during the Compass process to provide a roadmap to creating a workplace learning and development plan that is aligned with the department goals and objectives. That tool is the Individual Development Plan (IDP) and the final action plan is the result of a collaborative effort between you and your supervisor. One of the guiding principles for the Compass program is that individuals are responsible for their career growth and management. Another important concept is that one of the best places to learn and develop new skills is in your current position. It pays to enlist your supervisor's support rather than working independently.

## What tools will I need to get started?

The following resources and information will help you get started on your IDP. The first column represents information provided in the Compass orientation sessions. There are several other tools and resources with which most employees are familiar.

### Compass Tools:

- ▶ *Accountability and Skill Guide*
- ▶ *Staff Development Resource Guide*
- ▶ *Individual Development Plan*
- ▶ *Success Factor Worksheet*

### Other Tools:

- ▶ *Seven Goals for Lehigh*
- ▶ *Performance Appraisal* (most recent)
- ▶ *Position Description*

### Other Resources:

- ▶ *Workplace Learning and Performance* (<http://www.lehigh.edu/~inhro/traindev.html>)
- ▶ *The Learning Connection* ([http://www.northampton.edu/Prof\\_Com/cbi/ldi/learningconnection.htm](http://www.northampton.edu/Prof_Com/cbi/ldi/learningconnection.htm))
- ▶ *Library and Technology Services (LTS) Seminars* (<http://www.lehigh.edu/lts/sems/lts-seminar.html>)
- ▶ *Build and Enhance your Skills through Training (BEST) Fund* (<http://www.lehigh.edu/~inhro/benefits/best.html>)

## What is an IDP?

An IDP is the name of a form that helps guide individuals through the *Compass Guide* and allows them to systematically develop a roadmap to enhance knowledge, skills, and abilities for their current position or to help prepare them for the next level of work or different work. Each IDP is tailored to meet the needs of the specific job family because accountabilities; knowledge, skills, and abilities; education and work experience; and success factors vary by job family. The IDP allows the individual to review relevant information and to assess his or her current level of proficiency in various areas.

## How do I develop an IDP?

The IDP follows the same structure as the *Compass Guide* and provides areas for self evaluation and comments. The *Guides* are tailored to the specific job family, which means that the accountabilities, skills, and success factors will be different. As you read through the *Guide* you are able to take notes and identify areas for potential development. The tool also allows your supervisor to comment and offer suggestions for new skills or knowledge that will help meet the departmental goals and objectives. The end result is an action plan to enhance workplace learning and performance. It also includes a list of suggestions to help individuals get started.

## What is the employee's role?

The first step is for you to complete the plan. The second step involves a discussion with your supervisor or an HR advisor. It is important to discuss areas in which you desire to enhance your current skills or to develop new skills with your supervisor. By doing so, your plan will be aligned with current goals and objectives and you are more likely to obtain commitment and support for the plan. A third step is to research some of the opportunities for learning listed in your *Staff Development Resource Guide*, identifying several alternatives (date, content, cost) to discuss with your supervisor. Most importantly, be sure to identify ways in which you will benefit and the contributions you will be able to make to your job.

### **What is the supervisor's role?**

A supervisor's role includes guiding, assisting, and supporting staff members in managing their learning, development, performance, and careers. The supervisor's role is to provide direction regarding the priorities for the department and to help you link your work to Lehigh's strategic plan. Your supervisor will most likely be thinking along these lines: What are the goals and objectives for the department? How will the training and development support the department's priorities? How will you be able to add value once you return to work? What is the expected outcome of the time you spend learning?

Your supervisor may support some of your requests – especially if they are aligned to the department's priorities – or may recommend other areas for learning and development. The supervisor's role is to provide coaching and feedback on your plan. In the end, it is your supervisor who will approve the time away from the job and who will fund some or all of the costs of the program.

The *Compass* program encourages supervisors to support staff in terms of their development and career aspirations whenever possible. Fostering a learning environment frequently energizes staff and that, in turn, supports Lehigh's quest for excellence. It may not always be possible, and that also is a subject for discussion with your supervisor.

### **What are the benefits of having an IDP?**

A plan is a wonderful thing to have. As the Cheshire cat said to Alice in *Alice in Wonderland*:

*"Would you tell me, please, which way I ought to go from here?"*

*"That depends a good deal on where you want to get to,"* said the Cat.

*"I don't much care where —"* said Alice.

*"Then it doesn't matter which way you go,"* said the Cat.

*"—so long as I get somewhere,"* Alice added as an explanation.

*"Oh, you're sure to do that,"* said the Cat, *"if you only walk long enough."*

Instead of taking Alice's approach, develop a plan and follow through. The chances are that you will learn new skills, bring back new ideas, and develop a renewed sense of commitment and energy in your work. If your goal is to advance in your career, your chances of success are enhanced with a plan. Think of the *IDP* as a roadmap to achieving a future goal.

The *IDPs* may form the basis for a group, team, or department plan to make sure that the skills needed to achieve strategic objectives are available.

### **What is the best time to complete an IDP?**

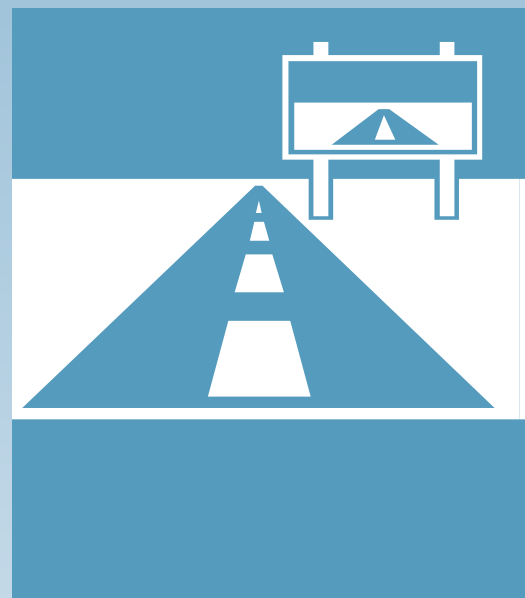
Any time is a good time. Any time, that is, other than peak work periods. If all else fails, use the performance appraisal discussion as an opportunity to discuss workplace learning as well as performance. With so much else going into the appraisal, however, it would be simpler to pull workplace learning goals from a completed *IDP*. You can extract information from the *IDP* for the annual performance appraisal or use the performance appraisal to help you prepare your *IDP*.

### **How frequently should I prepare and review my IDP?**

There are no set time frames. This will vary depending on the circumstances. They may be as short as one year or as long as three to five years if you choose to pursue a college degree as part of your plan.

The chart on the following page demonstrates how the process could work and illustrates how *IDPs* are aligned to department goals and objectives. In the next issue of *LASER*, we will provide a completed sample *IDP*.

*"Would you tell me, please, which way I ought to go from here?"*



# How *IDPs* are aligned to department goals and objectives

## Individual

Staff member chooses to start the process:

- Compiles tools and resources
- Obtains copy of department goals and objectives.

## Manager

- Manager may ask staff to complete Individual Development Plan (IDP)
- Manager provides a copy of departmental goals and objectives to staff member

Individual completes self assessment and provides copy to supervisor. Includes:

- Individual goals and objectives
- Suggests areas for *Workplace Learning and Performance (WPL)* to support achievement of goals and objectives
- Researches available activities and programs.

Individual prepares a list of questions and/or items for discussion.

Establish a date for a meeting to discuss results and to develop a plan:

- Compiles tools and resources
- Obtains copy of department goals and objectives.

- Supervisor reviews Individual Development Plan (IDP)
- Compares individual assessment and Workplace Learning and Performance (WLP) plans with departmental needs.

Meeting held  
*(avoid peak work periods)*

- Provides feedback and coaching
- Clarifies priorities based on business needs
- Determines what is feasible
- Clarifies expected outcomes.

- Additional research if necessary
- Finalize details of plan
- Obtain supervisor's final approval.

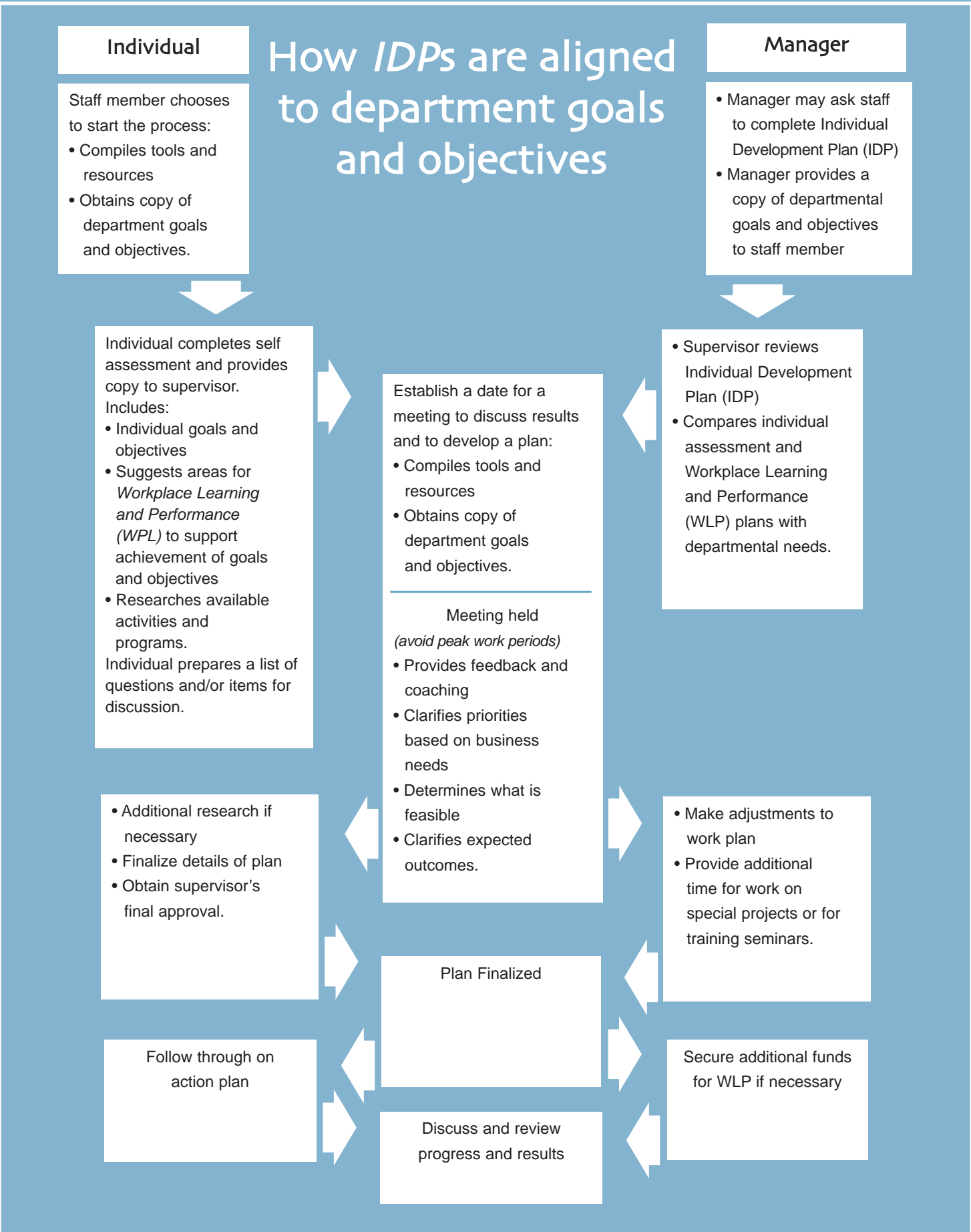
- Make adjustments to work plan
- Provide additional time for work on special projects or for training seminars.

Plan Finalized

Follow through on action plan

- Secure additional funds for WLP if necessary

Discuss and review progress and results



# Performance Management Process

*The performance appraisal cycle for 2005 is complete and it is time to look forward. One of HR's goals is to align the performance management tools with the Staff Employment Value Strategy. We have talked about this in meetings and in written communications. It is time to initiate the process. Below are some of the steps and ways in which we will seek your assistance to accomplish this objective:*

## **April – June 2006:**

- ▶ Assess the current process and analyze results in preparation for new process
- ▶ Share survey results with the community and establish initial goals.

## **July 2006:**

- ▶ Establish an advisory committee on performance management
  - This advisory committee will be instrumental in shaping the new approach
- ▶ Begin to develop preliminary concepts for the new format and process to be introduced in late 2007
- ▶ Use new format and process for the first time to assess performance for 2007 and to set goals and objectives for 2008:
  - This will provide employees with ample time to become familiar with success factors, setting goals and objectives, and workplace learning and development plans.
  - This process has evolved slowly over time beginning in 2005, and employees will have had two to three years (depending on when their job family compass was scheduled) to become familiar with the new concepts and new expectations.

## **October 2006:**

- ▶ Determine transitional features and messaging for 2006 appraisal cycle to further reinforce the concept of success factors, emphasize planning and goal setting, and workplace learning and development
- ▶ Distribute 2006 performance appraisal information to be completed in 2007.

## **January – September 2007:**

- ▶ Design and develop new performance management process and format
- ▶ Implement new process and format
  - Provide training programs to staff and supervisors.

## **October 2007 – March 2008**

- ▶ Final communications about the new process and format
- ▶ Begin use of new process and format.

## **April – June 2008:**

- ▶ Evaluate use of new process and format
- ▶ Make necessary adjustment for 2009 cycle.







# Q&As



**My position description was written by the person previously in my position. How can I be sure that it is still accurate?**

You can review your position description (PD) at any time. You will need to access the PD through the on-line PD tool on the *Campus* Portal. Call Human Resources for your position number and password at extension 85020. If you feel that the PD is not accurate, please discuss this with your supervisor.

**My job has changed quite a bit since my position description was written. May I revise my position description?**

Yes, you can make changes to your position description as long as you discuss the changes with your supervisor first and the proposed changes are appropriate. If the position changes are significant, supervisors may request that a staff member's position be reevaluated. Your supervisor should contact Ronnie Hesch in Human Resources at extension 85020 for information on the process.

**Based on what I've read in the Compass guide for my job family, I think my job should be in a different grade. What should I do?**

The first place to start is always with your supervisor. Discuss the guide and your position description with your supervisor pointing out the differences and why you think your position should be a different grade. Keep in mind that to move to a higher grade you will need to perform all of the accountabilities listed in the guide in the higher grade – not just some of them. If after

reviewing the information with your supervisor you both feel the position should be reevaluated, call Ronnie Hesch in Human Resources at extension 85020 for information on the process.

**How do I move into a higher grade without changing departments? What do I have to do?**

There are many things to think about when considering this question. First and foremost is based on the departmental need. Does the department need a position that is a higher grade? What accountabilities and responsibilities need to be met within the department by this position? If your supervisor determines the need for such a position, then he or she should contact Human Resources for assistance in developing the accountabilities and skills needed for that position.

**In addition to my administrative accountabilities, I also perform a lot of accounting work. The amount of accounting work I do has increased over the past couple of years. I think I should be in the Finance/Accounting job family. What should I do?**

We certainly have many positions on campus with accountabilities in several different job families – however positions can only be in one job family. Ask your supervisor to contact Ronnie Hesch in Human Resources to find out the process to reevaluate your position to determine if the job family has changed and also to determine if the grade is appropriate based on the change in scope of the position.

# HR's Timetable

## *What we've accomplished*

### **Objective:**

### **Lehigh Action:**

New Staff Compensation Program

- ✓ Define a total compensation philosophy (*Staff Employment Value Strategy—SEVS*)—*done*
- ✓ Write position descriptions—*done*
- ✓ Job evaluation program—*done*
- ✓ Develop the program—includes market assessment, salary structures, pay policies and titling criteria—*done*
- ✓ Rollout—training and implementation—*done*

Market Equity Adjustments—Phase 2

- ✓ Develop methodology to assess appropriate salary range placement for Lehigh staff employed before March 2004—*done*
- ✓ Determine appropriate salary rates for individual staff members who may be eligible for adjustments—*done*
- ✓ Implement adjustments—*done*

## *It's on our plate—We're working on these right now*

Career and Professional Development

- ✓ Develop *Job Family Compass Guide* and *Staff Development Resource Guide* with job family accountabilities and standards for 24 job families – *seven completed; three in process*
- ✓ Develop job family career development program—*seven completed; three in process*

## *Looking to the future . . .*

Benefits Allocation Review

- ✓ In 2007, we will begin a comprehensive benefits review and complete this review in 2008

Career and Professional Management

- ✓ Design a career management service—September 2006
- ✓ Develop programs to support career management—September 2006
- ✓ Implement career management program—2007
- ✓ In 2007, we will look at the current performance appraisal program and implement improvements to align with *Staff Employment Value Strategy*

Performance Management

- ✓ In 2007, we will look at the current performance appraisal program and implement improvements to align with *Staff Employment Value Strategy*





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## Glossary

### **BEST Program (Build and Enhance your Skills through Training)**

As a Lehigh employee, you may take work-related, noncredit courses through this external training subsidy program. This program subsidizes 75 percent of the cost of employee enrollments in noncredit programs similar to those offered by Northampton Community College (NCC) – up to a maximum of \$500. Your department will be responsible for the balance of the cost. The training must be approved by Human Resources before you register for the course or seminar. There are three eligibility requirements:

- ▶ You must work 75 percent or more of a full work schedule to take two seminars per semester.
- ▶ You must also have an active assignment on the date of the seminar.
- ▶ Finally, the seminar must be related to your job and be the type of training supported by the program.

### **Cash Merit Payment**

A *Cash Merit Payment (CMP)* is used to ensure an appropriate reward for staff members who are performing at or above expectations and whose salaries are above the grade maximum. In lieu of a salary increase, staff members will receive a semi-annual cash payment – one July 31 and the other January 31. The amount of the *CMP* will be commensurate with the amount the staff member would have received as a merit increase.

### **Merit Increase**

A merit raise is an increase in an individual's salary resulting from an evaluation of his or her performance in a position during 2005.

### **Performance Appraisal**

The process by which employees receive continual and meaningful feedback from their managers. It is also a process that evaluates performance as a step toward enhancing it. An integral part of this process is forward looking. Setting goals and objectives provide the framework for future appraisals and link individual goals and staff development to the departmental and university strategic plan.

### **Self Appraisal**

A process that gives a staff member the opportunity to provide his or her perspective regarding performance during the appraisal period. This process also prepares the staff member for a participatory discussion with the manager/supervisor about his or her performance. The self appraisal process encourages an employee to be proud of his or her accomplishments and candid about his or her areas for improvement.

### **Workplace Learning and Performance**

The new term for Training and Development:

- ▶ *Workplace* – The workplace is the primary place the learning activities are taking place. Learning is also taking place in the context of the business – the goals, systems, resources, and incentives of the organization.
- ▶ *Learning* – Learning is a process that drives performance through the development of individual and organizational knowledge and expertise. It also entails a broader definition that includes all opportunities – formal and informal, planned and unplanned – that lead individuals to learn and develop new knowledge and skills.
- ▶ *Performance* – The outcome of learning (individual, group, and organizational) should be linked to individual, departmental, and institutional outcomes.