

Welcome to HR Partners!
March 13, 2018



Agenda

- **Physical Plant Today Website**
- **Benefits Program Updates**
- **Performance Appraisal Training**
- **Announcements and Deadlines**
- **Spin the Wheel!**

Physical Plant Today Website

**Ron Brooks,
Assistant Vice President, Physical Plant**

Physical Plant Today Website

- New web site will give daily updates on Physical Plant projects
- <http://memphis.edu/pp/ppt.php>

Physical Plant Today Website

- Provide a place where campus community can get timely, reliable, and up-to-date information from Physical Plant.
- Train the campus community to use our website for information rather than calling work control.

Physical Plant Today Website

- **Information provided:**
 - Emergency notification
 - Maintenance working buildings
 - Construction schedule
 - Schedules of work events, such as:
 - Special events
 - Accreditation schedules
 - Custodial cleaning assignments
 - Floor care schedules

Physical Plant Today Website

- **What's Up?**

This is information provided to inform our employees, such as:

- **Meetings**
- **Training**
- **Social events**
- **Problems**

Benefits Updates

Patricia Polania

**Assistant Director, University Benefits
Administration**

TCRS Transfer Letters Mailed to ORP Eligible Members

- Notifications letters providing information regarding transfer from ORP to TCRS for Optional Retirement Plan (ORP) members who have accrued 5 years vesting were mailed the week of February 28th. Details regarding the cost and the transfer process were included in the letter.
- Employees may review plan information regarding TCRS at the TCRS website at <http://www.treasury.tn.gov/tcrs/index.html>.
- For questions, members may contact RetireReadyTN at (800) 922-7772 (when prompted, say TCRS, then Agent).
- The University Benefits Administration office can be contacted at benefits@memphis.edu or by calling 678-3573 when you are ready to start the process.

Health Saving Accounts (HSA)

- The Internal Revenue Service (IRS) announced on March 5, 2018 a decrease in maximum Health Savings Account (HSA) contributions.
- The change is due to the Tax Cut and Jobs Act signed into law late December 2017.
- The family contribution limit for HSAs has been reduced from \$6,900 to \$6,850.
- Any family contribution to an HSA in 2018 over the max could be subject to taxes and penalties.
- The individual contribution limit for 2018 will remain at \$3,450.

2018 Wellness Program

- Following the award of the wellness program contract back in July, one of the proposers filed a protest. The protest process is still ongoing.
- All parties involved are expediting the process and it is anticipated that a hearing on the issues will be scheduled in March.
- Until a resolution of litigation is met, the State will not have a wellness program in place.
- For updates, visit the <http://partnersforhealthtn.gov>.

No Well-Being Assessment (WBA) March Deadline in 2018

- Members are asking about the Partnership Promise deadlines. As a reminder, the Partnership PPO went away in 2017 and was replaced with the Premier PPO.
- There is no Partnership Promise in 2018. So there is no March 15 deadline for the WBA and no July 15 deadline for the biometric screening.

Performance Appraisal Training

Danny Linton & Tracy Horton
Assistant Directors, Human Resources

Our Office...

- **The Office of Employee Relations & Engagement within the Department of Human Resources supports the faculty and staff of the University of Memphis in providing services as it relates to performance management, performance improvement, conflict resolution and recognition programs to name a few. Our goal is to assist you in having a safe and successful work experience here at the University of Memphis.**

Performance Appraisal versus Performance Management

Performance Appraisal

- One-time event
- Reflective
- Short term
- Correction-oriented
- Completing assessment

Performance Management

- Ongoing
- Prospective
- Long term
- Planning/goal-setting
- Completing assessment

Planning for Performance Appraisals

- Plan in advance.
- Plan for open dialogue: opportunity to review performance, consider lessons learned, evaluate progress, and establish goals/objectives for upcoming cycle.
- Schedule sufficient time to focus on the review with each employee.
- Prepare to discuss the full range of issues that may arise in the performance management discussion.
- Don't exhibit defensiveness; if employee criticism is justified due to management failure or lack of resources, accept it and move on to next area of review.
- Respect confidentiality of the review discussion when possible. If unlimited confidentiality cannot be promised, advise employee accordingly.
- Job descriptions should be reviewed.
- No cell phones, no emails, no text messaging, no electronic devices, no interruptions.

Setting Goals and Expectations: A Collaboration

Your Role as Supervisor

- **Clearly communicate expectations re: job responsibilities and competencies (skills) and behaviors.**
- **Communicate how individual goals align with department and organization goals. Create mutually agreed timelines for progress reports on goals and objectives.**
- **Define and establish specific goals and objectives for the review period. Help your employees set clear, measurable performance goals.**
- **Offer advice and guidance regarding your employee's performance on a consistent on-going basis.**



Setting Goals and Expectations: A Collaboration

Your Employee's Role

1. Understand how their role aligns with University, division and department goals, and participate actively in setting expectations.
2. Work with you to set clear, measurable performance goals.
3. Monitor their own performance compared to expectations.
4. Seek advice and guidance as needed from you.

Crafting S.M.A.R.T. Goals

Goals are designed to help you identify if what you want to achieve is realistic and determine a deadline. When writing S.M.A.R.T. Goals use concise language, but include relevant information.

1. **Specific** - What do you want to accomplish? Who needs to be included? When do you want to do this? Why is this a goal?
2. **Measurable** - How can you measure progress and know if you've successfully met your goal?
3. **Achievable** - Do you have the skills required to achieve the goal? If not, can you obtain them? What is the motivation for this goal? Is the amount of effort required on par with what the goal will achieve?
4. **Realistic** - Why am I setting this goal now? Is it aligned with overall objectives?
5. **Timely** - What's the deadline and is it realistic?

Crafting S.M.A.R.T. Goals Continued

- Department Goals link to University Goals listed below.

Student Success	Research and Creativity	Access and Diversity
Partnerships	Campus Culture and Service Excellence	Sense of Place

- Manager and Supervisor Goals support Department Goals.
- Employee Goals align with Department Goals.
- Aligned goals help employees see how their day-to-day activities contribute to the success of the University.

Avoid Common Pitfalls:

Pitfall Tips:

- **Too many goals** – Limit the number of annual goals to 2-3 to ensure focus on the most important results.
- **Unclear accountability** – Clarify who is accountable for achieving the goal, especially important in teams or where work is highly interrelated.
- **Unclear expected results or measures** – Clearly describe the qualities or measures of the expected results to reduce uncertainty.

Performance Evaluations: Broad versus Specific

BROAD

- Mary is a thought leader in the company.
- Mary is a team player and gets the job done.

SPECIFIC

- Mary developed a new way to process mail which provided for quicker delivery.
- Mary assisted several new employees in learning the functions of their job and had one of the highest productivities in the department.

Performance Evaluations: Broad versus Specific

BROAD

- Mary doesn't communicate well.
- Mary has poor attendance and needs to work to improve it.

SPECIFIC

- At times I, as well as other employees, was unable to determine Mary's needs as she didn't fully explain the problems she was confronting.
- Mary had 3 occurrences within a two month period which is below the company standard. Mary needs to work during the next evaluation period to ensure that her occurrences are limited to 1 per month.

Turning Negatives into Positives

- **“Your work has been sloppy lately.” becomes “Your last three reports contained an unacceptable number of statistical errors.”**
- **“You’re obviously not a mathematician.” becomes “I know you’re capable of producing more accurate work.”**
- **“Don’t let it happen again.” becomes “How can we prevent errors from creeping into reports?”**

Performance Appraisal Deadline

- The deadline for annual performance appraisals has been extended to **April 30, 2018** for all staff employees (both exempt and non-exempt). Standard annual appraisal dates should cover:
 - March 1, 2017 thru April 30, 2018 (non-exempt employees)
 - April 1, 2017 thru April 30, 2018 (exempt employees)
 - If no evaluation was completed within the past 12 months, the period of review will be from May 1, 2017 to April 30, 2018.
 - Employees on probationary periods should not be appraised until the end of their six-month cycles.

Performance Appraisal Resources

Performance Appraisal of Staff Employees Policy – UM 1242

- ☐ <http://umwa.memphis.edu/umpolicies/UM1242.htm>

Performance Appraisal Reference Guide

- ☐ <http://www.memphis.edu/emprelations/guide.php>

Online Performance Management Assessment System

- ☐ <https://memphis.edu/performance>

Online Performance Management Assessment System (Testing Site)

- ☐ <https://umwebtest.memphis.edu/performance/>

**What happens if the employee
receives a score of
59 or below?**



Performance Improvement Process (PIP)

<http://policies.memphis.edu/UM1557.htm>

- Available to hourly paid staff employees who have completed six months of employment
- General Employment Related Counseling
- Level I, II, III (probationary periods for 30, 60 or 90 days)
- Employee Assistance Program (EAP)
- Training and Development
- All PIP documents should be reviewed by the Office of Employee Relations and Engagement prior to meeting with the employee

Performance Improvement Process (PIP) Notification Form



Performance Improvement Process Notification Form

Please return completed form to Human Resources (176 Administration Building). Attach additional documentation if necessary.

Section I: Employee Information

Name: _____ Banner ID: _____

Date of Hire: _____ Job Title: _____

Section II: Performance Improvement Process Information

Level: Initial Warning
 Level I (30 days)
 Level II (60 days)
 Level III (90 days)

Previous Verbal Warnings: Yes No

Recommended to the Employee Assistance Program: Yes No

Work Performance Issues:

Corrective Action To Be Taken:

Effective Date: _____ Release Date: _____

Section III: Signatures

Employee's Name: _____ Employee's Signature: _____
Date: _____

Supervisor's Name: _____ Supervisor's Signature: _____
Date: _____

Supervisor's Title: _____ Supervisor's Phone: _____

Section IV: Distribution

Original—Human Resources Copy—Employee Copy—Supervisor

A Tennessee Board of Regents Institution
An Equal Opportunity/Affirmative Action University



Performance Improvement Process (PIP) Release Form

 <p>THE UNIVERSITY OF MEMPHIS.</p>	<p>Employee Self-Identification Disclosure Form</p>
<p>To: (Insert Employee's Name)</p> <p>From: (Insert Supervisor/Manager's Name)</p> <p>Subject: Performance Improvement Process Release</p> <p>Date: October 18, 2017</p>	
<p>Please be advised that you have successfully completed the terms of Level ____ of the Performance Improvement Process (http://umwa.memphis.edu/umpolicies/UM1557.htm) given to you on _____.</p>	
<p>We encourage you to review any departmental or university policies and procedures that will assist you with maintaining continuous and improved work performance. Your signature below acknowledges that you have received a copy of this release.</p>	
<p>In support of your continuous improvement please be advised that you may take advantage of the Employee Assistance Program (EAP) which addresses personal and workplace issues. If you are in need of services a representative can be reached 24-hours a day, 7 days a week by calling 1-855-437-3486. EAP brochures are available in 165 and 176 of the Administration Building.</p>	
<p>_____ Received by</p>	<p>_____ Date</p>
<p>_____ Supervisor/Manager</p>	
<p>An Equal Opportunity/Affirmative Action University</p>	

Performance Management Plan (PMP)

- Applies to exempt (monthly) employees
- No multiple levels
- Plan can be for a minimum of 30 days and a maximum of 90 days
- Memorandum of understanding
- All PMP documents should be reviewed by the Office of Employee Relations & Engagement **prior** to meeting with the employee

Employee Assistance Program (EAP)

- Adult and Eldercare Services
- Child, Family and Parenting Support
- Convenience Services Referrals
- Education
- Legal, Financial and Retirement
- Chronic Illness and Condition Support
- Relationship Information and Support
- Safety and Crisis Planning
- Stress and Depression
- 1-855-437-3486 or website at www.here4tn.com
- Available 24 hours a day



Demonstration



Contact Us

Office of Employee Relations & Engagement
176 Administration Building



Margie Williamson
Senior Director

mawllmsn@memphis.edu

678-3076



Tracy Horton
Assistant Director

tlhorton@memphis.edu

678-3540



Kimberly Stevenson
HR Associate

kljnes10@memphis.edu

678-2603

E-mail Address: emprelations@memphis.edu

Announcements & Deadlines

Family-Friendly Campus Survey

- In the spirit of the new Paid Parental Leave benefit, a committee has been formed to look into ways to make the UofM a more family-friendly place for faculty & staff
- In the coming weeks, a survey will be going out to get your opinions on this topic.
- Faculty & staff members are strongly encouraged to participate in this survey.

Announcements & Deadlines

- **HR On the Road**
- **All employees should plan to attend a session**
- **Upcoming Sessions:**
 - **March 22: 304 University Center (9 a.m. – 12 p.m.)**
 - **April 25: 363 University Center (1 – 4 p.m.)**
 - **May 17: Psychology Auditorium (1 – 4 p.m.)**
 - **June 13: 1610 Community Health Building (1 – 4 p.m.)**

Announcements & Deadlines

- **Pre-Retirement Seminar**
- **Scheduled for April 30, 2018**
- **Plan to invite those employees who are near retirement**
- **Quarterly retirement info sessions will continue throughout the year**

Announcements & Deadlines

- **MPLOY 2018**
 - Applications still being accepted by the City of Memphis for youth ages 14-21
 - HR will begin recruiting supervisors in March for the summer program
 - Sessions run for six weeks through June and July
 - Youth are paid by the City of Memphis and considered UofM volunteers

Announcements & Deadlines

- **Customer Service Training**
March 13, 10:30am – 12pm
AD177B

March 27, 2pm – 3:30pm
AD177B

Announcements & Deadlines

- **Brown Bag Series**
- **AD 177B, 1pm – 2pm**
- **Upcoming Sessions:**
 - **March 14: Intruder Safety: Derek Myers, Assistant Chief of Police**
 - **March 28: Self-Defense & Personal Safety: Marco Anderson, Police Sergeant**

Announcements & Deadlines

- **Banner Navigation**
March 27, 2018
10 a.m. AD178
- **WorkforUM Training**
April 25, 2018
1:30 p.m. AD178

Thank you for attending!
memphis.edu/hrpartners

