

1989

Personnel Study Group 1989

Bowling Green State University. Administrative Staff Council

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FINAL REPORT
OF THE
PERSONNEL STUDY GROUP

April 7, 1989

I. PERSONNEL STUDY GROUP

The group to study the proposed consolidation of personnel functions on the BGSU campus was appointed by President Olscamp in November 1988. The members of the Study Group were chosen from various areas of the University community for their experience and expertise in personnel management and for their potentially different perspectives on how a personnel consolidation could or should take place. Members of the group are:

Bill Bess, Director, Management Support Services
Gaylyn Finn, University Treasurer
Annmarie Heldt, Director, Administrative Staff
Personnel Services
Bob Kreienkamp, Chair of Classified Staff Council
Ed O'Donnell, Assistant Director, Food Operations
Norma Stickler, Assistant to the Vice President
Academic Affairs
Dick Ward, Associate Professor, Management

The group met for the first time on December 8, 1988 and was given the following charge by the President:

-What functions should be incorporated in this office?

Which existing employees should be assigned/attached to a consolidated office?

When consolidated, which additional skills or positions would be necessary for the successful operation of the office?

In January 1989 Dr. Olscamp reconsidered his initial position of the vice presidential reporting relationship of a consolidated personnel office and the group was charged with the study of where or to whom the office would/could/should report.

Other considerations arose from committee discussion of the charge given by President Olscamp. Those considerations involved title of the office, organizational structure within the office, and its physical location on campus.

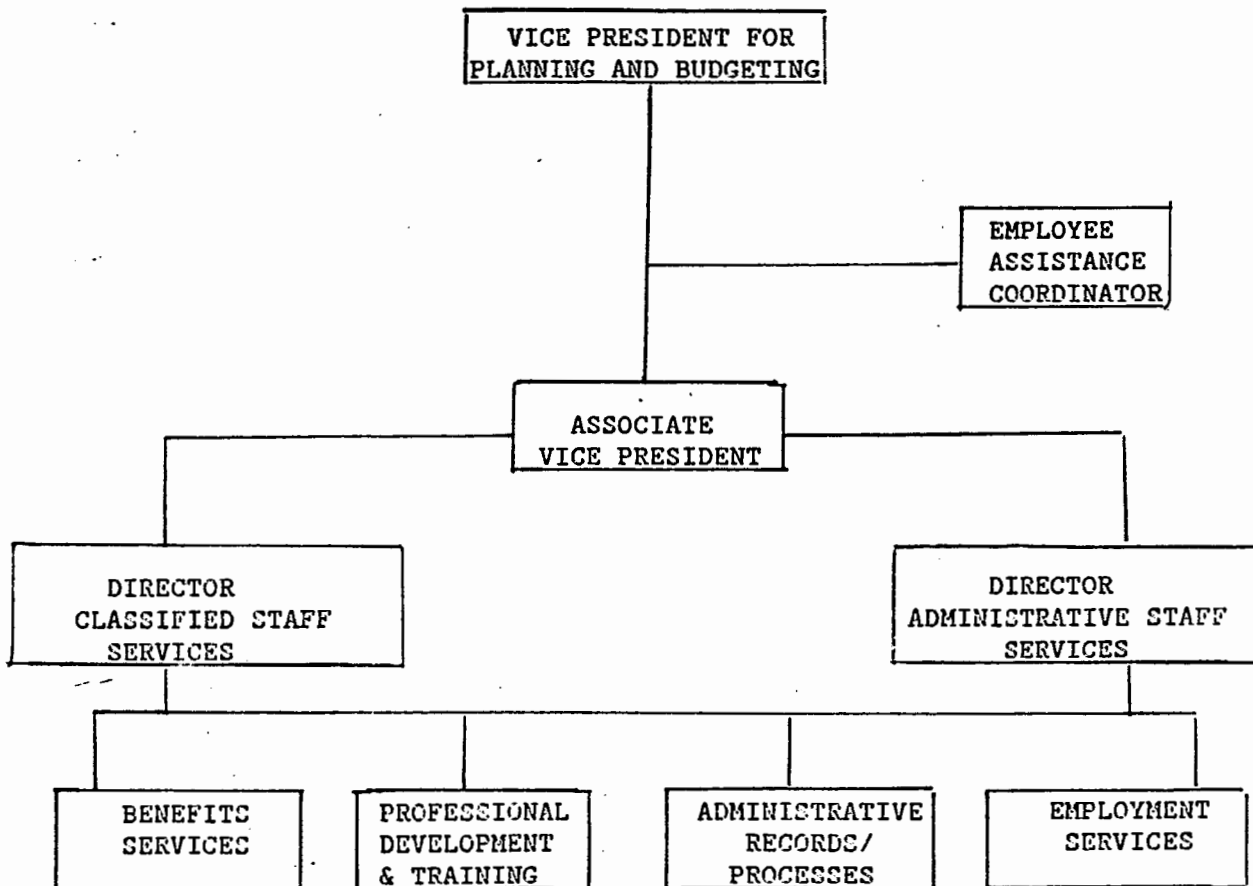
II. CONCERNS OF BGSU EMPLOYEE GROUPS

Throughout its deliberations, the Personnel Study Group remained sensitive to the concerns of the three employee groups that serve BGSU: the classified staff, the administrative staff, and the faculty. In fact, the Study Group invited a representative from each employee group to summarize employee concerns about the Group's task. Given the input from these and other sources, the Personnel Study Group believes that the primary "New Personnel Office" concerns of the three employee groups are as follows:

CLASSIFIED STAFF: For a variety of reasons, many classified staff employees perceive the Classified Staff Personnel Office as an agency that does NOT act in their best interests. Thus, the basic lack of trust that characterizes the classified staff's perceptions of "their" personnel office is likely to be transferred to any "new" personnel office, unless the "new" office would take great pains to demonstrate that it would NOT be conducting "business as usual." The Study Group agrees that there is a serious need for strong, positive, and stable leadership in this area.

ADMINISTRATIVE STAFF: In contrast, administrative staff employees perceive the Administrative Staff Personnel Office as an agency that DOES act in their best interests. This perception is the result of the Administrative Staff Personnel Director's aggressive actions to respond to the long-standing concern of administrative staff employees that they are the "orphans" of BGSU. Accordingly, many administrative staff employees have expressed a concern that "their" personnel office would become "buried" in any combination of personnel activities into a "new" personnel office. To offset such a concern, the "new" office must demonstrate to administrative staff employees that it WILL continue to conduct "business as usual."

FACULTY: BGSU faculty will actively respond to any perceived threat to their traditional self-governance rights. Most faculty appeared to be fully reassured on this point by President Olscamp's announcement that the Personnel Study Group's recommendations would have no impact on faculty salary, tenure and promotion decisions. Nevertheless, the Study Group believes that its recommendations concerning benefits, office administration, professional development/training, employee services, and records management may evoke some faculty anxiety, as these activities will necessitate faculty interaction with the "new" personnel office. However, the Study Group is confident that no legitimate faculty self-governance concerns will arise from a careful review of its recommendations.



III. RECOMMENDATIONS

The following recommendations are made based on the deliberations of the Study Group and its belief that the Personnel Department must have as its overall philosophy a commitment to provide a service to the employees and to maintain the highest levels of trust and confidentiality. Further detail and rationale for each recommendation follows the list.

- ✓ 1. There should be consolidation of several personnel functions for University employees, but a separate director of Administrative Staff personnel services and Classified Staff personnel services should be retained.
- 2. The Department should report to the Vice President for Planning and Budgeting.
- ✓ 3. The name of the consolidated office should be the Personnel Department.
- ✓ 4. The functions of the Personnel Department should include
 - A. Administration, Records Management
 - B. Benefits
 - C. Professional Development and Training
 - D. Staffing Procedures
 - E. Employee Services

The following key positions should be part of the restructured Personnel Department -- with the expectation that present BGSU employees may be retained or appointed to fill vacancies.

- Associate Vice President (new)
- ✓ Director of Classified Staff Personnel (vacant)
- ✓ Director of Administrative Staff Personnel
- Employee Assistance Coordinator (new--split from Employment Services)
- Manager of Development and Training
- Manager of Benefit Services

*Personnel
Committee*

- ✓ 5. The head of the Department should have the title of Associate Vice President.
- ✓ 6. The position of Employee Relations Advisor (Employee Relations Coordinator) should be retained but renamed as Employee Assistance Coordinator and should be a free-standing appointment, reporting directly to the Vice President.
- ✓ 7. The Department should be located near the center of the campus.
- ✓ 8. Implementation should occur as soon as possible.

9. The Personnel Department should, on a regular basis, work with academic departments and programs to establish internships.

IV. RATIONALE FOR THE ABOVE RECOMMENDATIONS:

1. There should be consolidation of several personnel functions for University employees, but a separate director of Administrative Staff personnel services and Classified Staff personnel services should be retained.

Although the present lack of coordination may exist more in perception than in reality, there is clearly a need to have better coordination of some personnel functions. Presently, for example, all employee benefits are coordinated in one office, yet employees often call other offices with questions about their benefits. Within the functions listed below, several areas of needed consolidation are described.

There are areas in which the consolidated services of the Personnel Department will be designed for all University employees--benefits, new employee services, departing employee services, development and training. However, in the functions such as hiring, performance evaluation, liaison with governance groups, reclassifications, and testing, the services of the department will be focused on administrative and classified staff. Academic departments and colleges should continue to provide services relating to the hiring and evaluation of faculty including tenure, promotion and salary changes.

There are sufficient differences between policies governing the administrative staff and the classified staff and sufficient volume of work in each area that a separate director for each is justified. It is the Study Group's recommendation that while many of the functions handled by the Personnel Department will be performed for all employees, there is a need to have a sub-area identified for the administrative and classified staff that can efficiently perform the services unique to each group. It is important to maintain administrative entities with which the classified and administrative staff can directly identify and which will be liaison offices to the respective governance councils.

2. The Department should report to the Vice President for Planning and Budgeting.

The consolidated personnel function should be organizationally placed to make clear to all affected that the department is of

great importance and will be given the attention that is warranted. There was general agreement among the study group that there are distinct advantages to having the new personnel department report to the Vice President for Planning and Budgeting (see Chart). This recommendation results from a strong feeling that a) placement in Planning and Budgeting would add significantly to the perception of a real change in direction for the Personnel Office and would reinforce the fact that the new department will serve all three employee groups; b) The Operations Area is more technically oriented and personnel functions more closely align themselves with those of Planning and Budgeting; c) because such a large percentage of the classified staff work in the Operations Area, it is our belief that they would view Planning and Budgeting as a more neutral office; d) the Administrative Staff Personnel Services Office already reports to Planning and Budgeting; and e) it is a logical placement because of the primary role of personnel considerations in any planning activity.

3. The name of the consolidated office should be the Personnel Department.

The Study Group considered the possibility of using one of the titles currently in vogue, such as Human Resources. We are recommending Personnel Department because that is inevitably the name that people will use and because it is important to avoid any semblance of trying to effect change that is merely cosmetic.

4. The functions of the Department should include Administration/Records Management, Benefits, Professional Development and Training, Employment Procedures, and Employee Services. To fulfill these functions, the following key positions should be part of the restructured Personnel Department: Associate Vice President, Director of Classified Staff Personnel, Director of Administrative Staff Personnel, Employee Assistance Coordinator, Manager of Development and Training and Manager of Benefit Services.

- A. Administration/Records. It is recommended that the Personnel Department be the repository of the official personnel file for all administrative and classified staff employees. Because career and payroll decisions for faculty will continue to be handled by academic departments and colleges, the official faculty personnel files should be retained in the VPAA office as is presently the case. Basic employment information however, will be maintained in the Personnel Department.

It is recommended that the Personnel Department move to a computerized record keeping system that will allow better access

to employee records and improvements in gathering data. All employee files should be updated to a current and uniform format. The Department should be the repository of salary/demographic studies so that the Department can, in turn, provide information and analyses to University decision makers.

The Associate Vice President will maintain liaison with the Ohio Department of Administrative Services and other appropriate State of Ohio offices.

- B. Benefits. The Benefits Office should coordinate benefits for all employees. The services of this Office should be expanded to provide information and assistance on insurance matters, fee waivers, vacation, sick leave, workers' compensation, and other miscellaneous benefits. The Office should provide information, but not advice, on annuities, day care, credit union membership, and retirement.

Although there has been some discussion on campus about the need for a Department to offer retirement counseling, it is the recommendation of the Study Group that the Personnel Department limit its retirement services to providing information about PERS and STRS and to the sponsorship of workshops at which experts may present options for the employees' consideration. The Personnel Department should not provide retirement counseling in the sense of advising employees about their retirement options. Retirement decisions are of great financial import to the employee, and the University should not be engaged in providing financial or personal counseling; furthermore, only the STRS and PERS offices in Columbus have the employees' complete retirement records. The University should, however, sponsor workshops such as a Retirement Awareness Program to assist employees in planning for retirement when they are still in early stages of their careers.

- C. Professional Development and Training. Although there is presently some employee training for classified staff, there is a pressing need to expand the professional development and training services. The faculty has the resources of the Faculty Improvement Leave Program, the academic departments, the Faculty Research Committee and the Faculty Development Committee to enhance research and teaching skills, but there is insufficient effort to provide for the professional growth of the administrative and classified staff members. Professional development and training should become one of the major functions of the Personnel Department and should have a budget sufficient to promote professional and personal growth for employees. Some of the activities should be available for all

employees, including the faculty. Among the activities that could be sponsored are workshops to train supervisors, budget administrators, and new chairs/ directors, sessions to sensitize employees to sexual and racial harassment concerns and human relations skills, to train for new jobs and new technologies, to improve the morale and motivation of employees, and to enhance management skills, particularly in the areas of employee evaluations, discipline and grievance procedures. One overall theme of the program should be to assist employees in their desire to change positions by identifying possible career paths or, to improve their performance in their current positions. It is recommended that the professional development activities be a combination of providing on-campus workshops and off-campus professional development opportunities. Such expanded activities may require additional professional staff.

The Professional Development and Training function could also include staff recognitions, staff communication, and post-retirement programming in order to involve retirees in the University and call upon their expertise.

- D. Employment Procedures. The Personnel Department should continue to handle all details of hiring, testing, job audits, and reclassifications for classified employees and the hiring of administrative staff employees.

A particular area where consolidation is needed applies to services for new employees and departing employees. Presently new employees must go to several offices to complete forms for payroll, bank deposit, insurance, immigration registration (I-9 forms) or to obtain keys, I-D cards, handbooks, parking tags, benefits summaries, etc. These services should all be consolidated so that any new employee can be sent to one place--the Personnel Department--to complete all of the above forms and obtain information relevant to new employees.

It is recommended that the Personnel Department provide services and information to departing employees. For employees who are resigning to take another position, the services would entail collection of keys and parking tag, sign-off from the computer system, confirmation of payment for sick leave and vacation, and an exit interview. In addition, for employees who are retiring, the Department should provide information on the PERS or STRS retirement systems. All retirees should be kept on selected mailing lists to receive information about the University (e.g., Monitor, At EG) or to receive invitations to return to the University for special functions.

Services to continuing employees are covered in most of the above recommendations, but others of importance should be mentioned. One important service is to assure that every employee has a safe work environment, thus the occupational safety and health of University employees should be a major function of the Personnel Department.

Above all, the Personnel Department should be the first place that an employee thinks of when a question arises about a personnel policy or personnel problem.

5. The head of the Department should have the title of Associate Vice President.

It is recommended that the leader of the new department be titled Associate Vice President for Personnel. This will demonstrate the singular importance of the Personnel function. The filling of the position should be the top priority. It is recommended that the Associate Vice President have as much latitude as ideally possible in staffing the secondary positions. Organization and management of the new department would be a shared responsibility of the two directors under the leadership of the Associate Vice President. The departmental structure should be in place by September 1. The attached chart is intended to provide a general representation of relationships and functions in the new department.

6. The position of Employee Relations Advisor (Employee Relations Coordinator) should be retained but renamed as Employee Assistance Coordinator and should be a free-standing appointment, reporting directly to the Vice President.

It is recommended that the position of Employee Relations Advisor be retitled as Employee Assistance Coordinator. The coordinator should report directly to the Vice President for Planning and Budgeting and should be a person who will command the respect and confidence of all three employee groups. The coordinator's office should not be immediately adjacent to or part of the personnel department complex. Instead, it should be in a separate building with separate clerical support.

The coordinator would serve employees as something less than an advocate--yet not an arm of the University administration--but would be accountable, nonetheless, to the Vice President. The reasons for this recommendation are: 1) the present configuration of the position does not invite employee confidence in objective or fair treatment; 2) the position has been poorly perceived by the classified staff as an arm of the administration.

The Associate Vice President should seek input from representatives of user groups to determine the effectiveness of the position and its incumbent.

7. The Department should be located near the center of the campus.

The study group also feels strongly that the new department should be centrally located on the campus -- with adequate visitor parking in close proximity to the department. Plans to temporarily move the Personnel Support Services, Benefits/Insurance, and Workers' Compensation divisions to the "transition facility" at the north end of the campus are vigorously opposed by the Study Group. Because of the high level of daily visitation to the Personnel Department by employees, job applicants, and administrative representatives, it is critical that the Personnel Department be located where there is both physical and perceptual access.

8. Implementation should occur as soon as possible.

It is recommended the Associate Vice President be selected and "on board" as soon as possible and that the new department be formally established very shortly thereafter.

This new Associate Vice President should begin the process of organizing and staffing the department immediately, and meet with employee groups, employees, administrators, and supervisors in an early effort to build strong, positive working relationships with an appropriate understanding of concerns, problems, programs, and interests of all. A directory of the staff in the new Personnel Department and their areas of responsibility should be developed and disseminated widely to the campus community to begin the process of improving communication.

V. CONCLUSION

In summary, all Study Group members agreed that the Personnel Support Services Office, as it currently functions, is not able to administer effectively to the needs of the campus community. It is the opinion of the study group that a consolidated personnel office, under the direction of an Associate Vice President of Personnel reporting to the Vice President for Planning and Budgeting, would best serve the interest of the Administrative Staff, Faculty, Classified Staff, prospective employees, and the Administration.

The Personnel Department would provide services in the following areas: Benefits Management, Development & Training, and Employment and Records Services. Consolidation of these services would provide one central location that all University employees could utilize, thereby eliminating confusion and duplication of services.

Throughout the group's discussions, two areas of concern continually surfaced. One was the importance of both the Administrative Staff and the Classified Staff having a liaison who would specialize in handling the respective staffs. Secondly was the need to create an Employee Assistance Coordinator. The office of the EAC would not be included in the consolidated Personnel Department and would report directly to the Vice President for Planning and Budgeting.

The consolidation of the Personnel Department provides an opportunity to emphasize the overall philosophy for the Department, namely, that it provides a service to and for employees.



Bowling Green State University

Administrative Staff
Personnel Services
Bowling Green, Ohio 43403
(419) 372-2558
Cable: BGSUOH

April 10, 1989

MEMORANDUM

TO: Paul J. Olscamp
President

FROM: Members of the Personnel Study Group

The study group would like to express its appreciation for the opportunity to participate in the review of the personnel functions at the University. We look forward to meeting with you April 20th.

mb



Bowling Green State University

Office of the President
Bowling Green, Ohio 43403-0010
Cable: BGSUOH

May 16, 1989

Ms. Annmarie Heldt
Administrative Staff Personnel Services
Bowling Green State University
Bowling Green, Ohio 43403

Dear Annmarie:

This is a belated letter summarizing our meeting of April 20, 1989, and speaking to the future. It is also an expression of my deeply felt gratitude for the long hard hours you put into this task, which is so important to the future of our great University. Please accept my gratitude for your service, and as I will mention in a moment, my thanks for your future advice.

At our meeting I noted the following:

1. I accept Recommendations 1, 3, 4 (with the possible change of certain titles), 5, 7 (as campus renovation and other capital permit), I'd like more time to think about recommendation 6, although I agree the present arrangements are unacceptable, and 8 (on July 1).

At this point I do not agree with Recommendation 2. I would like to review the reasons for my disagreement. My reasons rest primarily upon my belief that your arguments in favor of the position reporting to the Vice President for Planning and Budgeting are questionable. You claim that placement of the Personnel Office in Planning and Budgeting would "add significantly to the perception of real change in direction for the Personnel Office". This is perhaps true, but the question is whether the difference in perception alone would be worth possible negative consequences of placing the office where there are few present individuals with experience in personnel matters. I tend to think not.

Secondly, you state that the Operations area is "more technically oriented and personnel functions more closely align themselves with those of Planning and Budgeting". Operations is certainly as "technically oriented" as Planning and Budgeting, but the technology required to perform the relevant functions is simply different in each case. I also don't see how personnel functions are "more closely aligned" with Planning and Budgeting than Operations, a point I examine on the next page.

Third, you note that because a large percentage of the Classified staff work in Operations, you believe they would view Planning and Budgeting as a more "neutral office". I am not sure I understand this reasoning. Our Personnel Office of course is not supposed to take sides against anyone, nor to

make value judgments, but even more to the point, why would people in Operations believe that a personnel office reporting to the Vice President for Operations would be less than fair to them? I should think that it would likely be a benefit for them rather than a deficit.

Fourth, it is true that the Administrative Staff Personnel Services Office already reports to Planning and Budgeting, but their functions include very few of those proposed for the consolidated office.

Finally, you note that the placement of the Personnel Office in Planning and Budgeting would be "logical" because of "the primary role of personnel considerations in any planning activity." It is true that personnel considerations, that is to say costs, are primary in Planning and Budgeting at the University since the large majority of our operating costs are for people. However, costing the personnel function at the University is not the job of a personnel office; the personnel office would deal with maintenance of records, the concerns of individual employees, the administration of benefits, training, counseling in areas such as retirement, and ensuring that the University's written personnel procedures and processes are followed. None of these have much to do with Planning and Budgeting.

For these and other reasons, I am not persuaded that the department should report to the Vice President for Planning and Budgeting.

However, because I respect your collective judgments so highly, I will not place the office permanently in the division of Operations at this time. As I informed you on April 20, the Peat Marwick Administrative Efficiency Study of the University recommended that we hire an outside consultant to review the entire administrative structure to see whether we might attain additional efficiencies, even though overall Peat Marwick thinks the University is well administered. We are going to hire such a consultant this fall, and therefore I will probably place the Personnel Office temporarily in the division of Operations effective July 1, at least until we have the results of the outside consultants' examination of our entire administrative structure.

Moreover, even this decision is not completely final. After discussing the major findings of your report with Dr. Ann Marie Lancaster, Chair of the Faculty Senate, Professor Lancaster urged that I consider the possibility of having the office report to me until the outside consultant's opinions of the administrative structure have been rendered. I promised that I would give this suggestion serious consideration.

We will proceed with hiring the director (or whatever the ultimate title might be) for the office, and for the other administrative consolidation of the functions described in your report effective July 1.

I hope that the question of ultimate placement so far as reporting is concerned will be settled no later than the end of the Fall Semester, and hopefully sooner.

As I noted in our April 20 meeting, I would not like to disband your group at this point. I believe that because the ultimate question of placement of the office has not been settled, and because there will be many unanticipated questions to be answered as we make this consolidation, your advice could be valuable to me and to whomever the office reports on an interim basis. Therefore, I would like to keep the group in formal convocation, and I shall call you together to meet with me from time to time as advice is needed. I do appreciate your willingness to do this, and we will have our first meeting early in July.

Again, many thanks for your considerable service, and I look forward to seeing you in the future.

Best wishes,

Paul J. Olscamp
President

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