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Notes

1. Photocopies
2. Post-It Notes
Memorandum

TO: ASC Personnel Welfare Committee
FROM: John Moore, Executive Director, Personnel Services
        Marshall Rose, Director, Affirmative Action
RE: Promotion & Advancement opportunities for administrative staff
DATE: November 4, 1993

The questions surrounding promotion and advancement opportunities for administrative staff have taken on more importance in a climate of increasing workloads, decreasing staff, and fewer and less generous pay increases. From the perspective of enhancing staff morale in the face of these realities, it is essential to take supportive actions to encourage administrative employees. As a general principle, the Affirmative Action Office and Personnel Services will support any actions designed to address these issues that do not undermine our legal and ethical obligations to equal opportunity employment. Pursuanty, we can and do support the following:

1. **Mandating interviews for all employees who meet the defined criteria.** This should allow for increased interviewing opportunities for administrative staff. Hopefully, this increased interviewing opportunity will put the staff member in position to more effectively articulate their capability to do the job. We do not believe that it will result in such an unusually high number of interviews that it would be too burdensome. Moreover, it should not substantially increase the expenses of the interview process, since the candidates involved are local.

2. **Using acting and interim appointments to facilitate administrative experience within and across divisions.** Acting and Interim appointments present an excellent opportunity to acquire experience outside an employee's "home" area. Perhaps it would be possible for administrative vacancies to be deferred for posting for a period of at least six months during which time an internal employee could acquire experience in the position. Obviously, there may be compelling reasons to move more rapidly, and if this is the case the regular process could go forward.

3. **Establishing a job exchange program for administrative staff.** This would allow two employees, with the approval of their supervisors, to
Personnel Welfare Committee
Page 2

exchange jobs for six months to a year. It is envisioned that their compensation would be unaffected. These could only be temporary exchanges; any permanent opening must be subject to an appropriate search.

4. **Creation of a Higher Education Administrative Institute.** This would be an intense three to five day educational experience for up to 15 administrative employees. In addition to a curriculum featuring the nuts and bolts of higher education administration, the Institute would include an internship component that would give participants exposure to a different area of administration. The internship would be sponsored by an administrator at the University that is stationed preferably at least two levels above the intern.

5. **Interpreting education and experience as equivalent qualifications.** All posted job requirements would be amended to give equal weight to degrees and experience. For example, ads would ask for "an M.A. degree or equivalent experience." A year of education and a year of experience would be treated as being equivalent.

6. **Education program series for administrative supervisors on--Interpreting Employee Qualifications: Getting the Best Person for the Job.** It will be necessary, if we are to really address the problem of how our supervisors interpret and evaluate employee qualifications, to affirmatively attack the philosophical suppositions from which they are operating. Much of the problem stems from the fact that in higher education we are accustomed to hiring subject matter specialist, i.e. faculty, and bring that same mentality to the search for administrators. This means that we have not valued transferable skills in the same way we have specific experiences. Frankly, we must reeducate members of the administrative staff community who are largely responsible for hiring decisions at the University. Perhaps, ASC can sponsor, we would certainly be willing to assist, a series of professional development programs to address these issues. The title mentioned above is just an example of what such a program could be called.

It is our view that establishing career paths for employees may be contrary to more open and less restrictive advancement criteria. As we understand it, career paths typically chart a narrow path defined by the career (experience) interests of the employees involved. This would seem to be more restrictive than looking at the generic and transferable skills of an employee.
Finally, you ask about making career advancement possible without restricting the prerogatives of managers to hire "the best" person. We submit that this may not always be possible, or for that matter necessary. If "the best" is always defined as the person with the appropriate degree or the directly related job experience, the individual without this—however skilled they may truly be to do the job—will always be viewed as less qualified. Furthermore, this individual's potential will always be under appreciated. It seems to us that our managers will have to be willing to allot reasonable opportunities for employees to be trained and acquire hands on experience rather than always choosing the candidate that appears ready to hit the ground running.

TO REVIEW FOR TOMORROW'S MTG.
Job Analysis

The Mercer Group has been hired to conduct a job analysis of all administrative staff positions. The goal of the study is to establish consistent titles and pay ranges for administrative positions. Each position will be evaluated. This is a great opportunity to rectify the inequities in titles and pay. To guarantee success each administrative staff person must participate. Please let your constituents know it is extremely important to attend one of the meetings on October 11 and to take a great deal of time filling out the evaluation instrument. The steering committee representing the vice-presidents, president, ASC, Personnel Welfare and Personnel Services will be working closely with Mercer to insure the best possible outcome.

Child Care Facility

The Board of Trustees will vote tomorrow on a draft of a contract with WSOS to build a facility on University property as a family development/head start program. The lease calls for a separate agreement with the University to take care of child care needs for the faculty, staff and students. From what I understand this will be contingent on the University obtaining state funding. We should know more on the funding situation later in the semester.

Presidential Search Committee

Marshall Rose met with the Executive Committee and updated us on the search. A very general ad has been placed in The Chronicle. The committee is formulating a leadership statement which is a more detailed position description. We have already submitted a leadership statement on behalf of administrative staff. It is possible there may be some forums for constituent groups to talk further with the committee about the statement. The process has been very open; each time the committee meets I have been informed by memo of the date and place of the meeting.

Computer Communication

Fifty people are on the discussion list. We are beginning to get some discussion going and feedback on various issues. Please encourage your constituents to contact Deb Wells to sign up. Also we now have a folder on Gopher. So far the minutes of the last meeting and goals are on it. Soon the constituent network and handbook will be on it.

Open House

Congratulations to Marsha for a job very well done. Also thanks to Bryan for organizing administrative staff. Thanks to all staff members who volunteered for either an Information Booth or balloons.

CUPA

Bowling Green submitted our CUPA data last week. Thanks to Bob Waddle for filling in to help compile the information.

Personnel Issues

Bryan and I are meeting on a regular basis with John Moore to keep in touch and up to date on all the various issues. If anyone has a specific item of concern, we will be glad to take it to John and try to get it resolved.

Performance Evaluation

The committee has been asked to evaluate a draft of an evaluation form and get feedback to John so the next meeting can be set up. It is the intention of Personnel to have a standard form approved by January. ASC will have a chance to approve the form before it goes to Ad Council.

November Meeting

Will be in Founders. President Olscamp will join us for lunch at 12:15 and speak at the meeting. Please plan to be at lunch and encourage your constituents also.
INTRODUCTION

This packet has been prepared to introduce a new collaborative program established between Bowling Green State University (BGSU), Eastern Michigan University (EMU), and the University of Toledo (UT).

It is a professional development program designed specifically for upper middle managers and senior level professionals within these three institutions. Contained in this packet are the mission, goals, proposed curriculum, selection criteria, expected costs, time lines and historical perspectives. Additional documents (application materials, selection matrices etc.) will be forthcoming.

HISTORY

On April 22, 1994 senior administrators from the Human Resources / Personnel Departments, the Affirmative Action Offices, the Continuing Education Offices, and the Training Offices of the three institutions came together to discuss the possible creation of a new program designed to encourage the development and retention of professional staff and mid/entry level managers.

The meeting was initiated by John Moore, Executive Director of Personnel Services at Bowling Green. The concept was to roughly model a program after a 1989 venture called MIDWEST 2000: Project Leadership that had been created by six midwestern institutions. Suseanne Crawford, Dean of Continuing Education at BGSU, described the earlier project for the group and was hopeful that it could be recreated and modified to meet the needs of the three schools for this project.

By the end of the first meeting, it was agreed that the need existed and warranted proceeding with further development of what was by then called the "PROFESSIONAL DEVELOPMENT INSTITUTE" (PDI).

A second meeting was held in May and produced the following mission statement and goals. Discussions on curriculum, resources, timeline and costs followed. Further refinement took place on June 30 when the group met for the third time and began to firm up the earlier brainstorming ideas.

The following pages are the product of the meetings to date.
MISSION

The mission of this program is "to enhance skills in our professional staff that will enable our respective universities to fill future senior management positions, with special emphasis on women and minorities".

GOALS

The goals of the program are listed, but not restricted, to the following:

1. to prepare the Universities' administrative / professional staff for increased management responsibilities.

2. to prepare staff to handle their current positions with more comfort and confidence.

3. to prepare individuals for change, within the higher education systems, and the external environment which affects these systems globally.

4. to prepare these individuals to think "systems wide".

5. to increase the numbers of minorities and women to be considered for upper management positions.

CURRICULUM

The proposed curriculum will include, but not be restricted to, the areas outlined below.

I. THE INTELLECTUAL MISSION / Organizational Strategies

* Higher Education Sectors (Public State / Regional, Private, Community Colleges)

* The Role and Future of "the University" as we know it (system wide, specific to each of the three)

* Systems of University Governance and Finance (the changing patterns of governance, planning, performance)

* The Intellectual Mission: Undergraduate / Graduate Education
Strategic Management - organization strategy, strategy implementation, competitive analysis

II. SYSTEMS and SERVICE

* University Budgeting - "macro and micro"
* Financial Processes - Accounting, Auditing, Analysis, Payroll / Benefits, Investments, Liabilities, Risk Management and Legal Affairs
* Internal: Information Technology, Plant Maintenance, Contracted Services, Purchasing, Public Relations, Human Resources Utilization
* External / Outreach: Local, State, Federal relations
* Organizational Change and Development (communication processes for change)
* The Service Mission: staff and faculty (dealing with union and non-union environments)

III. TEACHING / RESEARCH

* The Education Mission: faculty culture, decision making, management issues
* The Changing Nature of the Mission

IV. SKILL / PROFESSIONAL ENHANCEMENT

* Effective Leadership / Management Practices (managerial decision making)
* Business Ethics / Conflicts of Interest
* Managing Human Resources: negotiation, motivation, empowerment, problem solving
* Communications: networking, customer service
* Managing the Multicultural Workforce
* Career Tracking
STRUCTURE

The institute will be run by a "steering committee" made up of the same individuals who developed the program. This committee will provide guidance and direction to the initial project and act on policy and curriculum issues. Each institution will be expected to have a "screening committee" to select the ten participants for the program using criteria established by the steering committee.

The "class" will be made up of thirty individuals - ten selected from each institution. This number is firm as it represents the best size to ensure optimal learning of classroom theory and application in the university setting.

It is expected that each of the three groups will be meeting regularly within their own institution as well as meeting as an entire class on a quarterly basis rotating among the three campuses.

The class meetings will consist of three days of concentrated learning activities including evening sessions and assignments. The on-campus activities will be an extension of these sessions as the teams work to address a problem / project assignments.

TIME LINES

Applications and supporting documentation for the PDI will be due by January 6, 1995. Application reviews and interviews on each campus are to be completed by the third week in January with the selection by the end of the month.

The program will begin with the first class session to be held at EMU's Corporate Education Center in mid-February 1995. Thereafter, the small groups will meet on a regular basis as established by their home institution. The following class meetings will take place first at the University of Toledo in July 1995, and then at BGSU in November 1995. The schedule will repeat itself in 1996.

COSTS

Estimated costs per institution will be $31,000 for the two years. This money will pay for the opening reception, 15 - 18 days of formal training, travel and overnight expenses, speaker and resource costs, all printed materials, steering committee expenses, and graduation ceremonies and reception.

On campus meetings are expected to be covered by each institution based on the schedule established and degree of work assigned.
SELECTION CRITERIA

To be considered for acceptance into this program, the applicant must:

1. currently hold an entry / middle management position or senior level professional position at one of the institutions. NOTE: Faculty members are not eligible.

2. have a minimum of 3 years of employment service with their respective institution.

3. have a minimum of a Bachelor’s degree or equivalent combination of education and experience.

4. be prepared to make a two year personal / financial commitment to the program (this will include evenings, weekends, and travel).

5. be self-nominated or nominated by a member of senior administration at the home institution.

6. ensure all application materials reflect accurate and up-to-date information about their current and past work history; references must be from those who can evaluate the applicant’s work abilities.

7. have received no less that "good" or "acceptable" performance ratings during the most recent evaluation period at their institution.

8. complete a personal interview with a screening committee on their own campus.

A limit of ten participants will be selected for the initial class from each institution. Special emphasis will be given for the inclusion of women and minorities.

NOTE: if an individual finds they must withdraw from the institute for personal or professional reasons, the steering committee will review the situation on a case-by-case basis to decide if any pay-back of monies spent will be necessary. A determination of any future participation in the program will also be made at that time.

CREDIT UPON COMPLETION

Upon completion of the entire two year institute - and full participation in the on campus activities associated with the program - the class members will receive formal certificates recognizing their successful participation.
MEMORANDUM

TO: ASC Executive Committee
FROM: Norma J. Stickler

The attached draft is for discussion at the next ASC executive committee meeting on December 14.
MEMORANDUM

TO: John Moore  
Executive Director, Personnel Services  

Marshall Rose, Director, Affirmative Action  

FROM: Greg Jordan, Chair  
Administrative Staff Council  

RE: Promotion and advancement opportunities for administrative staff

Your memorandum of November 4, 1993 to ASC Personnel Welfare Committee regarding promotion and advancement opportunities for administrative staff has been reviewed by the Personnel Welfare Committee, Executive Committee, and the full Administrative Staff Council. Your memorandum was composed as a result of PWC posing the following questions to you.

*Can we change the format of job descriptions to be less specific about requirements, such as requirements for a degree in a particular field, for a specific number of years of experience, etc. Could we automatically include in those to be interviewed any internal candidate who surfaced in the top ten percent after review by the search committee? How can we work with supervisors to help administrative staff members develop a career path and determine if there will be opportunities for advancement in the staff member’s current area or in another area of campus? How can we begin to look for skills rather than specific experience? How can we make career advancement possible without restricting the prerogatives of managers to hire the best person, and without jeopardizing our commitment to affirmative action principles?*

We applaud your interest in our concerns and your creative approach to working with us on these important issues.

We reprint below the numbered sections of your memorandum with our comments and/or suggested changes about each section.
1. **Mandating interviews for all employees who meet the defined criteria.** This should allow for increased interviewing opportunities for administrative staff. Hopefully, this increased interviewing opportunity will put the staff member in position to more effectively articulate their capability to do the job. We do not believe that it will result in such an unusually high number of interviews that it would be too burdensome. Moreover, it should not substantially increase the expenses of the interview process, since the candidates involved are local.

   PWC: Replace “mandating” with “offering.” Although the meaning remains basically unchanged, it seems less restrictive.

2. **Using acting and interim appointments to facilitate administrative experience within and across divisions.** Acting and Interim appointments present an excellent opportunity to acquire experience outside an employee’s “home” area. Perhaps it would be possible for administrative vacancies to be deferred for posting for a period of at least six months during which time an internal employee could acquire experience in the position. Obviously, there may be compelling reasons to move more rapidly, and if this is the case, the regular process could go forward.

   PWC: Agreement. We urge that interim and acting personnel be allowed to apply for the job when it is filled on a permanent basis.

3. **Establishing a job exchange program for administrative staff.** This would allow two employees, with the approval of their supervisor, to exchange jobs for six months to a year. It is envisioned that their compensation would be unaffected. These could only be temporary exchanges; any permanent opening must be subject to an appropriate search.

   PWC: Add “to initiate” in line 2: “This would allow two employees to initiate, with approval of their supervisors, an exchange...”

   While the concept is laudable, there are few practical opportunities for such an exchange, particularly in times of understaffing. Exchanges would necessitate placing a staff member in another area without training, perhaps to the detriment of that area’s clients. PWC suggests that
such an idea be implemented on a fellowship/internship approach, so that staff members could be accepted to observe and assist in another area, without an exchange. It is further suggested that if such a plan were successful internally, opportunities be explored for observations at other schools.

4. **Creation of a Higher Education Administrative Institute.** This would be an intense three to five day educational experience for up to 15 administrative employees. In addition to a curriculum featuring the nuts and bolts of higher education administration, the Institute would include an internship component that would give participants exposure to a different area of administration. The internship would be sponsored by an administrator at the University that is stationed preferably at least two levels above the intern.

PWC: This idea received enthusiastic endorsement. It is recommended that participation in such an institute be competitive and open to 20 men and women. In addition to the Professional Development Committee of ASC, The Office of Continuing Education is a potential area of assistance in organizing such a workshop.

5. **Interpreting education and experience as equivalent qualifications.** All posted job requirements would be amended to give equal weight to degrees and experience. For example, ads would as for "an M.A. degree or equivalent experience." A year of education and a year of experience would be treated as being equivalent.

PWC: With careful administration, PWC believes this recommendation can be very effective. Every administrative staff member, however, should have an earned bachelor's degree as a minimum expectation. It is further recognized that some jobs require certification or licensure, for which there can be no substitute.

6. **Education program series for administrative supervisors on Interpreting Employee Qualifications: Getting the Best Person for the Job.** It will be necessary, if we are to really address the problem of how our supervisors interpret and evaluate employee qualifications, to affirmatively attack the philosophical suppositions from which they are operating. Much of the problem stems from the fact that in higher education we are
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PWC: This section is endorsed.

It is our view that establishing career paths for employees may be contrary to more open and less restrictive advancement criteria. As we understand it, career paths typically chart a narrow path defined by the career (experience) interests of the employees involved. This would seem to be more restrictive than looking at the generic and transferable skills of an employee.

PWC: This section is endorsed; emphasis on looking for transferable skills is an important step in opening opportunities for staff.

Finally, you ask about making career advancement possible without restricting the prerogatives of managers to hire "the best" person. We submit that this may not always be possible, or for that matter necessary. If "the best" is always defined as the person with the appropriate degree or the directly related job experience, the individual without this—however skilled they may truly be to do the job—will always be viewed as less qualified. Furthermore, this individual's potential will always be under appreciated. It seems to us that our managers will have to be willing to allot reasonable opportunities for employees to be trained and acquire hands on experience rather than always choosing the candidate that appears ready to hit the ground running.

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ASC: Mandate interviews at least by the search committee for all internal applicants who are rated by the search committee as being in the top 25% of applicants. Implementation of this recommendation will require close work between the Personnel Services Office and the individual search committees to assure that these interviews occur and that this commitment to interview is not by-passed by the search committees that operate independently from the Personnel Services. In collaboration with Personnel Services, the search committee should provide guidance to the internal applicants about reasons why they were not selected.

Internal applicants who are not recommended should receive a phone call from the search committee chair so that the notification is not delivered via a form letter of rejection from Personnel Services.

ASC further encourages workshops/training to prepare staff for interviews (how to interview, how to prepare a resume, present yourself, etc.) Key indicators of success in administrative positions should be identified and workshops held to lead staff members toward attainment of the desired attributes.

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January 22, 1994
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