Memorandum

To: Dr. Edward Montgomery, President, Western Michigan University
    Dr. Jennifer Bott, Provost and Vice President Academic Affairs, Western Michigan University

From: Ms. Monica Liggins-Abrams, President, Administrative Professional Association
       Ms. Shannon Rininger, President, Professional Staff Support Organization

Date: May 8, 2019

Subject: Recommendations from Non-Bargaining Staff Employees

The Executive Boards of the Administrative Professional Association (APA) and Professional Staff Support Organization (PSSO) thank you for the opportunity to share recommendations for action in support of non-bargaining staff members at Western Michigan University (WMU).

We appreciate the initial investment of $50,000 in staff professional development made in 2018. Dr. Montgomery, your action demonstrates you heard us when we initially met and shows your appreciation for the contributions that staff members make to this institution. As you requested in our last meeting we are providing recommendations for future consideration to further support non-bargaining staff members at WMU. The recommendations for action were compiled from multiple data sources to demonstrate the critical need for change and ensure that we are moving beyond anecdotal evidence in our forming assertions. The data sources include:

- 2017 Staff Engagement Survey (SES) conducted by APA and PSSO
- Spring 2018 APA Membership Survey
- 2017-18 Collaborative Risk Opportunity Management (CROM) Annual Report
- Input from APA and PSSO Executive Boards

We appreciate your consideration of these recommendations and your commitment to support non-bargaining staff members at WMU. Working collaboratively and with your support we know we can make WMU the campus of choice for all.

Recommended Areas for Action

1. Increase on-boarding training and on-going professional development for non-bargaining staff and supervisors.
2. Require training for anyone (internal and external) hired into supervisory roles to refresh or learn leadership skills. This is critical for WMU to foster a culture of transformational leadership during this time of change.
3. Establish accountability among supervisors regarding employee performance reviews
4. Assess critical areas that are understaffed
5. Establish a staff council charged with collaborating with university leadership regarding policy changes that affect non-bargaining staff members
6. Improve communication, specifically with changes affecting staff

Explanation of Recommended Areas for Action with Suggested Action Item(s)

1. Increase on-boarding training and on-going professional development for non-bargaining staff and supervisors.

The 2017 APA/PSSO Staff Engagement Survey revealed that 51% of surveyed employees feel they need to receive training to continue to stay relevant in their positions. Leadership development was listed as one of the top-five areas where staff would like to have opportunities for additional training. In addition, the qualitative survey data revealed that staff members do not feel WMU provides adequate on-the-job training; most staff members recalled having to figure things out for themselves when they came on board. Staff members also expressed that training from division/units is inconsistent across campus.

APA and PSSO believe this is a critical area to address. There are inconsistencies in providing adequate training to new staff members and those transitioning to new positions—especially those with supervisory responsibilities—is inefficient. Ongoing professional development is needed to meet the evolving needs of the WMU community we serve, especially given the fast pace of change occurring in higher education. If staff members are not provided ongoing professional development, the institution sets itself up for employing a workforce that lacks the skills needed to meet future expectations in their roles. Additional investments in training and professional development will help staff members to meet the needs of a 21st century research university.

Action Items
- Utilize a recent needs assessment to help determine the focus of professional development and seek input from key stakeholders like APA and PSSO in the development of training and professional development offerings.
- Offer face-to-face workshops and training related to the competencies listed in the WMU Employee Performance Management Annual Review to attain skills commonly required for job advancement at WMU:
  - Budgeting
  - Communication
  - Customer service
  - Decision-making
  - Effective feedback and development
  - Fairness/diversity Leadership
  - Organizational awareness
  - Process improvement/innovation
  - Problem solving
o Teamwork
o Technical skills

- Hire part-time/temporary employees or identify qualified WMU staff/faculty to provide this professional development. If WMU staff/faculty are utilized to deliver professional development training, a small stipend should be provided if the work is outside the scope of normal duties.
- The Faculty Development Office at WMU offers much training and is open to staff members, but most staff are unaware of this resource. A broadening of awareness of that office’s mission as well as additional financial support could allow the office to offer staff-focused professional development training opportunities.
- Demonstrate the value of ongoing professional development by adding a field to the performance review form to allow staff and supervisors to specify a plan for professional development. For example, “Staff member will commit __ hours per month to developing their competency in __________,” or “Staff member will commit __ hours per month toward professional development training.”
- Establish a webpage to serve as the hub for listing all WMU professional development training opportunities. Give units that offer training the opportunity to add their offering to the list. A centralized listing of existing training opportunities that employees can be pointed to will raise awareness about existing workshops, presentations, etc.
- Create an expectation from leadership that continual learning and improvement on the job is not only necessary, but required. This is imperative in building an institutional culture that embeds, values and recognizes continuous improvement.
- Centralize professional development funding to improve efficiencies and provide equity for training opportunities.

2. Require training for anyone (internal and external) hired into supervisory roles to refresh or learn leadership skills. This is critical for WMU to foster a culture of transformational leadership during this time of change.

In the 2017 APA/PSSO SES, staff indicated leadership development as one of the top five areas for which they would like to see additional training. Mid-level managers play a substantial role in cultivating culture at the institution by promoting and enacting the mission and intuitional values. The qualitative data from that survey pointed to highly inconsistent work experiences at WMU. Some employees boasted of great work environments, while other staff members believe their work atmosphere suffers due to insufficient, enterprise-wide supervisor training. In addition, in the 2017-18 CROM annual report, CROM Team #7 identified enterprise-wide professional development training as a priority risk.

Action Item
- Human Resources should utilize our experts on campus from the Haworth College of Business or College of Education’s Educational Leadership department, to develop a training program offering a certificate of completion for staff at the program manager or
The training certificate could be a combination of face-to-face and self-study modules that supervisors complete over a year. The certificate would focus on being positive ambassadors for the institution and a demonstrated understanding of the University ecosystem, staff development, performance reviews and the other soft skills that managers need to become effective, inspirational transformational leaders:

- Building trust and community
- Communication
- Collaboration
- Conflict resolution
- Emotional intelligence
- Motivation
- Managing people with disabilities
- Strategic thinking
- Feedback (giving and receiving)

3. Establish accountability among supervisors regarding employee performance reviews

Another important element of creating a culture of continuous improvement is to adopt mandatory performance reviews for all employees. Performance reviews are an appropriate method for laying the groundwork for developing a highly focused workforce and a performance record lends to effective internal transfer hiring. Supervisors are the key player with performance reviews as they are responsible for completing them for their assigned employees and to help set the stage for their importance. Currently we have inconsistent performance review standards, which means we have some units and department that are diligent about completing reviews and many that never review employees. The lack of performance review records in an employee’s file can make decision-making about internal hites more difficult and has led to some very disappointing choices. A robust and well-developed culture of performance evaluation could also include methods for using performance reviews as an effective staff development tool.

Action Item
- Require supervisors to complete annual performance reviews for ALL direct reports.
  Supervisors should be expected to complete the performance evaluations (not employees)
  and use the performance review as a tool for staff development.

4. Assess critical areas that are understaffed

According to the 2017 APA/PSSO SES survey, 57% of respondents said their unit lacked sufficient staffing to meet workload demands. Many staff indicated their heavy workloads are a result of unfilled positions and understaffing. While we cannot increase capacity everywhere, targeting key areas will positively impact most employees, and the students we serve. A risk identified by the Retention Action Team is the lean and understaffed student support infrastructure on campus. The institution has not reinvested in areas that experienced drastic cuts years ago. Taking action in this
area supports Gold Standard Goal #4 Objective 4.4 Strategy b: "Identify and appropriately resource staffing levels in critical areas to support quality learner-centered access."

**Action Item**
- Add staffing capacity to certain “high touch” units on campus. We would like to see an analysis to determine target areas. In particular, all student service support areas should be closely evaluated to ensure the appropriate level of staffing exists to provide quality customer service. Additionally, over the last five years many positions have been vacated which have not been filled. In some cases, adding a part-time professional staff member could make a difference.

**5. Establish a staff council charged with collaborating with university leadership regarding policy changes that affect non-bargaining staff members**

The current University governance structures omit non-bargaining staff and we, APA and PSSO are requesting a more active and collaborative involvement in shared governance. Due to lack of intentional involvement in University governance, decisions and policies are sometimes changed in a vacuum. How these changes impact staff may be considered, but staff members, who are the experts of their own experience on campus, currently do not have the opportunity to be heard. APA and PSSO have attempted to fill this void by meeting with University leadership on a regular basis, however, APA and PSSO are still informed after the fact of some major changes at the institution and are not consulted with in a collaborative manner. A great example of this was the rollout of the FMLA policy changes for staff compensation members.

**Action Items**
- Form a Staff Council made up of members appointed by University senior leadership to give staff members the opportunity to have a more intentional voice in University governance and to provide valuable consultation regarding policy changes that impact staff.
- Give this council the authority to make recommendations for policy change. Two policy changes that members of APA and PSSO have great concern and would like to see revised are:
  - FMLA Policy
  - Six-Month Probation following placement in a new position for internal job candidates

**6. Improve communication – specifically with changes affecting staff**

Communication is key to transparency. We appreciate that transparency is a core value of the WMU Senior Leadership team. To allow for trust to be built and sustained, APA and PSSO believe that pertinent information should be shared with staff members in a clear and timely manner. Information intended to be shared for dissemination from the President’s Cabinet or Provost Council often does not trickle down to employees, especially those in smaller departments/units.
We know from anecdotal evidence that many staff members are frustrated because they receive insufficient, untimely information.

In addition to communicating changes, new policies and practices, the links to new/updated forms are often not updated on University websites or in the WMU Employee Handbook before changes are enacted. This has also led to frustration among staff members. The APA and PSSO boards have been advised that the updates to the website or handbooks are “coming.”

Ensuring that communication is transparent and timely supports two goals of WMU’s Gold Standard 2020 strategic plan: Goal #5 Objective 5.1 Strategy d: “Promote transparency and University accountability in all institutional systems,” and Goal #4 Objective 4.3 Strategy c: “Promote human resource practices and programming that meet the needs of WMU employees to enhance workplace engagement.”

**Action Item**
- Request the Office of Marketing and Strategic Communication create a standardized checklist for communicating change for vice presidential areas, departments, and units. This checklist should be a how-to guide that addresses how to communicate changes to various stakeholder groups on campus, such as staff.