Job Functions and Standards: Setting Clear Expectations for Success

Amanda Cornelius
Associate Vice President, Enrollment Management
Agenda

- The Why
- The Project
- Structure
- Project Implementation
- Feedback
According to a 2022 Gallup poll of over 15,000 people, “quiet quitting” is real.

The drop in engagement began in the second half of 2021 and was concurrent with the rise in job resignations. Managers, among others, experienced the greatest drop.

The overall decline was especially related to clarity of expectations, opportunities to learn and grow, feeling cared about, and a connection to the organization's mission or purpose -- signaling a growing disconnect between employees and their employers.
OSFA’s Needs

CLEAR EXPECTATIONS FOR STAFF & SUPERVISORS

SETTING ALL PARTIES UP FOR SUCCESS

REVISED ORG CHART TO MEET DEPARTMENT & STAFF NEEDS
The Project

Create consistent, transparent, and attainable job functions and standards for all OSFA employees.

Used as a reference by staff and as a tool for supervisors.
Origins

“How do I get an ‘Outstanding’ on my next performance review?”

“What do I need to do to get to the next level?”

No consistent progression/promotion ladder across areas
Origins

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“What do I need to do to get to the next level?”

No consistent progression/promotion ladder across areas

Needed measurable ways to demonstrate professional growth

Modeled after UC Berkeley’s Core Competencies & Behavioral Anchors

Can’t change the university’s appraisal form, but we can change our office’s approach
Structure

Job Functions

Standards

Core Competencies
Job Functions

• Broken into 4-5 Job Functions, depending on level
• Combines all standard job description requirements from all financial aid position levels
Job Functions

PERSONNEL MANAGEMENT
TEAM LEADERSHIP
DEPARTMENT LEADERSHIP
UNIT MANAGEMENT/PROGRAM MANAGEMENT
SUPPORT DEPARTMENT AND DIVISION PRIORITIES
Job Functions, Standards, and Core Competencies

Manager

Client Services – Scholarships – Operations

**Job Function 1: Personnel Management**

**Standards:** Recruit, hire and train employees. Provide input for employment decisions. Oversee performance appraisals and employment decisions for team and make recommendations to Assistant Director (AD) for recognition or corrective actions. Support AD in reviewing job descriptions and evaluating unit structure when filling positions. Assist team in setting individual goals, both short and long term. Work with AD to ensure management of program budgets. Maintain awareness of strengths & weaknesses of the team as a whole. Support AD in allocating resources to ensure staff efficacy and to meet department priorities.

**Core Competencies:** Inclusiveness, Stewardship, Problem Solving and Decision Making, Strategic Planning and Organization, Quality Improvement, Leadership, Managing People

**Job Function 2: Team Leadership**

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**Core Competencies:** Inclusiveness, Stewardship, Problem Solving and Decision Making, Strategic Planning and Organization, Communication, Quality Improvement, Leadership, Teamwork
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<tr>
<th>Advisor</th>
<th>Asst Manager</th>
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Standards

• Lists job responsibilities for each function.
• Typically items found on job descriptions posted to HR website.
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Core Competencies

• A set of capabilities, skills, and knowledge deemed important by OSFA leadership.
• Assigned to each job function
Core Competencies

- Inclusiveness
- Stewardship
- Problem Solving & Decision Making
- Strategic Planning & Organizing
- Communication
- Quality Improvement
- Leadership
- Teamwork
- Service
- Managing People (Supervisors Only)
<table>
<thead>
<tr>
<th>CORE COMPETENCY #1:</th>
<th>INCLUSIVENESS</th>
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<tbody>
<tr>
<td><strong>Demonstrates respect for people and their differences</strong></td>
<td><strong>Unsatisfactory</strong></td>
</tr>
<tr>
<td>Does not demonstrate inclusiveness; fails to recognize the value of differences.</td>
<td>Is often no aware of or interested in diverse backgrounds or points of view.</td>
</tr>
<tr>
<td><strong>Understands the benefits of a diverse workforce</strong></td>
<td><strong>Unsatisfactory</strong></td>
</tr>
<tr>
<td>Does not understand or promote the benefits of a diverse workforce.</td>
<td>Has minimal understanding of the benefits of a diverse workforce</td>
</tr>
<tr>
<td><strong>Is trusted and respected by others</strong></td>
<td><strong>Unsatisfactory</strong></td>
</tr>
<tr>
<td>Lack of inclusiveness fosters a lack of trust among customers and coworkers.</td>
<td>Tends to work either independently or with designated coworkers; trust is low among those not included.</td>
</tr>
<tr>
<td><strong>Includes and welcomes others</strong></td>
<td><strong>Unsatisfactory</strong></td>
</tr>
<tr>
<td>Is not welcoming or respectful; coworkers and campus partners often ‘work around’ to avoid interaction.</td>
<td>Is reticent to include new people or ideas.</td>
</tr>
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<td><strong>Works to understand the perspectives of others</strong></td>
<td><strong>Unsatisfactory</strong></td>
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<tr>
<td>Discourages different points of view; becomes defensive when asked to consider new/different ideas.</td>
<td>Is not always open to different points of view.</td>
</tr>
<tr>
<td><strong>Promotes opportunities to experience diversity on campus</strong></td>
<td><strong>Unsatisfactory</strong></td>
</tr>
<tr>
<td>Neither understands nor promotes opportunities to experience diversity on campus.</td>
<td>Needs to develop understanding and awareness of opportunities to learn about and experience diversity on campus for self and others.</td>
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Structure

• Purposely generic so a Manager in any area of the office knows what it takes to succeed
• Shows that general skills are transferable between positions
Project Implementation

• Sponsored by Associate Vice President

• Started with both Directors and worked our way down to Financial Aid Advisor (entry level)

• Each is written by Director of Compliance with the help of the position’s supervisor

• Once draft is created, meeting held with the employees currently in the positions to ensure the document encompasses all details
When it comes to determining how to achieve [the department’s overall direction], employees will feel a greater sense of ownership if they can contribute to the how.

This how includes everything from writing performance objectives to setting metrics for objectives.

-- John Baldoni
Feedback

Staff enjoyed being included in the creation of their own job standards – *input, ownership, buy-in*

Supervisors enjoy discussing and formulating standards with their staff while creating document.
Supporting Employee Growth & Development

• Give recognition & rewards
• Provide feedback in real-time, not just during annual reviews
• Use an LMS
• Encourage mentoring and coaching
• Identify & develop soft skills
• Implement cross-departmental training programs
• Continue to look for developmental opportunities
Current State

New employees have a clear path to success in their role (more consistent onboarding process)

Current employees have a clear understanding what it takes to succeed in their role and what it takes to get to the next level

Supervisors are to use this as a guide when writing performance evaluations

Gives a clear path for all staff on how to achieve a higher score on the performance evaluation
• UC Berkeley Core Competencies and Behavior Anchors

• “Is Quiet Quitting Real?”
  https://www.gallup.com/workplace/398306/quiet-quitting-real.aspx

• “Lead Your Boss: The Subtle Art of Managing Up” by John Baldoni

• “7 Ways to Support Employee Growth and Professional Development”
  https://www.glassdoor.com/employers/blog/support-professional-development/
Contact Info

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Thank you!