# Your Individual Development Plan (IDP)

Part I:

Human Resources Competency Self-Assessment

Job Group: HR Generalist, Staff Personnel



University of California San Francisco

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#### **Questionnaire Instructions**

#### **Background and Purpose**

Ongoing development is the key to improving consistency in Human Resources practices and supporting our career path at UCSF.

The Human Resources development process that you are about to undertake includes competencies in eight Human Resources functional areas. The HR Community group identified the functional areas and competencies as being key areas that HR Generalists must have confidence in so that services provided will be valued and supported.

#### **Self-Assessment Instructions**

- 1. Reflect on these questions:
  - What knowledge, skills and abilities are needed from me in my current job?
  - In what direction is my organization going and what will the organization need from me in the future?
  - What are my goals over the next three to five years?
  - > What are my greatest strengths and how can I build on them more effectively?
  - > Do I have any weaknesses that make it difficult to do my job or prevent me from reaching my goals?
- 2. With your responses in mind, review each competency below and rate your skill and confidence in enacting them for success in your current position. Also determine the how important the skill is in completing your job function:

#### Competency Ratings

- 1. Skillful and confident Minimal development needed in this competency at this time.
- 2. Somewhat skillful and confident Specialized development is needed in this competency.
- 3. Low skill or confidence Overall development is needed in this competency.

#### Job Relevance Factor

- 3. Very Important Knowledge in this area is critical to my job function.
- 2. Somewhat Important Knowledge in this area is helpful to my job function
- 1. Low Importance Knowledge in this area is rarely needed in my job function
- 3. Determine which areas to focus on first by following the steps on page 20 under 'Final Steps'.
- 4. Please partner with your supervisor to gain support for your new and/or ongoing development plans.
- 5. Enter your classification and your job title in the Job Description section on the last page of the assessment, page 26. Fax a copy of the assessment results pages, 19-26, to fax number 415/476-2328. We are requesting the assessment results by fax so we may gather statistical data to prioritize the competency areas to focus on when developing new training modules. If you have any questions at all, please contact Pamela Hayes, pamela.hayes@ucsf.edu, 476-6389.

#### Confidentiality

Your responses to this self-assessment are confidential and will not be shared with anyone. The accrued number of faxed documents will assist HR in verifying completion of the assessment and will provide statistical information for the Training and Development Department.

#### 1. GENERAL SKILLS, KNOWLEDGE AND ABILITIES

# Competency Rating Key = Skilled and confident - Minimal developm

#### **Job Relevance Factor Key**

- **1.** = Skilled and confident *Minimal development needed in this competency at this time.*
- **2**. = Somewhat skillful and confident Specialized development is needed in this competency.
- **3.** = Low skill or confidence Overall development is needed in this competency.
- **3** = Very Important *Knowledge in this area is critical to my job function.*
- **2** = Somewhat Important *Knowledge in this area is helpful to my job function*
- **1** = Low Importance *Knowledge in this area is rarely needed in my job function*

# 1. Compliance Competency Rating Job Relevance Factor Rating 2. Communication

#### Definition and Key Actions:

- Works to maintain compliance with all laws and University policies when making decisions and/or implementing strategies
- > Takes into account all potential impact (risk) an action may have to employees and/or the University as a whole

#### Definition and Key Actions:

- Ability to communicate clearly in writing and orally to express concepts, strategies, and information that affect the listener in the desired manner
- Ability to use open ended questions, clarifying techniques, active and reflective listening skills, and open body language to identify and express concerns in order to make a recommendation
- > Ability to actively listen and understand what others have said
- Ability to give feedback in constructive manner
- Ability to simplify complex information so that non-HR population will understand HR concepts and policies

# Factor Rating

Job Relevance

## 3. Consulting

# **Competency Rating**

**Competency Rating** 

# Job Relevance Factor Rating

#### Definition and Key Actions:

- Understands how to give advice to clients in a way that supports both the University's assets and the client's needs.
- Ability to develop an appropriate response, plan an intervention, and evaluate results in a manner that yields the desired outcomes
- Builds trust and develops relationships with clients

4. Coaching/Advocacy	
Job Relevance Factor Rating  5. Customer Service Orientation  Competency Rating	Definition and Key Actions:  ➤ Ability to understand customer expectations and requirements
Job Relevance Factor Rating	<ul> <li>and to use available resources, policies, and opportunities to support customers while upholding institutional values</li> <li>Ability to support and apply customer service standards such as collaboration, accountability, responsiveness and efficiency in everyday business transactions</li> </ul>
6. Professionalism  Competency Rating	Definition and Key Actions:  Ability to maintain a professional demeanor in difficult or stressful situations
Job Relevance Factor Rating	<ul> <li>Maintains patience with clients, demonstrates integrity, maintains confidentiality, demonstrates political acumen</li> </ul>
7. Strategic Direction and Ana	alysis
Competency Rating	<ul> <li>Definition and Key Actions:</li> <li>Demonstrates an understanding of UCSF's organizational direction, culture, business challenges, priorities and needs</li> <li>Ensures that services are aligned with business direction and</li> </ul>
Job Relevance Factor Rating	needs  > Understands how to identify and apply best practices  > Ability to gather, maintain and report on metrics to assist supervisors/managers in reaching their goals
8. Analytical/Problem Solving	Skills
Competency Rating	<ul> <li>Definition and Key Actions:</li> <li>Ability to think analytically and grasp complex concepts</li> <li>Ability to develop realistic strategies and options when faced with challenging situations</li> </ul>
Job Relevance Factor Rating	<ul> <li>Ability to diffuse and mitigate conflict and focus on business solutions</li> <li>Ability to effectively and consistently negotiate complex issues until the best possible outcome for the University is achieved</li> </ul>

9. Trair	ning and Development	
		Definition and Key Actions:
	Competency Rating	Ability to assess current and future training needs of the department and effectively develop and deliver customized training modules
		➤ General knowledge of the tools and resources currently available
	Job Relevance Factor Rating	<ul> <li>Supports and encourages the professional growth of employees</li> <li>Ability to advise employees and supervisors/managers on best development options to meet desired outcomes</li> </ul>

10. Records Management	
	Competency Rating
	Job Relevance Factor Rating

#### Definition and Key Actions:

- General knowledge of laws and policies related to the maintenance, storage and purging of electronic and hard copy records including financial and personnel files
- Understanding of what information can be stored in personnel files
- > General knowledge regarding who can access personnel files

# 2. PAYROLL AND APPOINTMENT ADMINISTRATION

2. FATROLL AND APPOINTMENT ADMINISTRATION	
11. Payroll Laws	
Competency Rating	Definition and Key Actions:
Job Relevance Factor Rating	Knowledge and understanding of payroll laws & UC policies as they relate to UC payroll processes
12. OLPPS	
Competency Rating	Definition and Key Actions:
Job Relevance Factor Rating	<ul> <li>Certified in OLPPS Entry/Update and has working knowledge of OLPPS mechanics (inquiry, entry and update)</li> </ul>
13. OPTRS	
Competency Rating	Definition and Key Actions:
Job Relevance Factor Rating	<ul> <li>Certified in OPTRS Entry/Update and has working knowledge of OPTRS mechanics (entry and update)</li> </ul>
14. PAN Reviewer	
Competency Rating	Definition and Key Actions:
Job Relevance Factor Rating	Understands the PAN reviewer processes and responsibilities
15. New Hire Procedures	
Competency Beting	Definition and Key Actions:  ➤ Understands new hire procedures:
Competency Rating	<ul> <li>Knowledge of documents that are included in a new hire packet</li> </ul>
	<ul> <li>Understands the process for campus or departmental transfers</li> </ul>
Job Relevance Factor Rating	<ul> <li>Understands which original documents are retained in the departmental personnel file vs. sent to Payroll</li> </ul>
	<ul> <li>Knowledge of time deadlines for critical documents (I-9; Oath/Patent)</li> </ul>
	<ul> <li>Understands the appropriate procedures to follow in the production, dissemination and retention of offer letters and understands the data elements in the offer letter that must parallel what is entered in OLPPS</li> </ul>
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16. Time Re	eporting Procedure	es
		Definition and Key Actions:
Co	mpetency Rating	Understands time reporting procedures and payroll deadlines (monthly timesheet preparation and reconciliation, preparation based on sub-1 or sub-2, exempt vs. non-exempt status, approvals, timesheet corrections/salary deductions, and accruals)
		<ul> <li>Understands procedures and payout related to overtime, comp time, time on-call, and holiday pay for all classes of employees under current purview</li> </ul>
Job Relevance Factor Rating	<ul> <li>Understands the "Time Benefits Roster" and reporting vacation/sick leave hours on the "Leave Reporting Worksheet" (and the timing of both each month)</li> </ul>	
	g	Ability to train departmental employees on timesheet procedures and to assist employees with questions related to pay and Sure pay statements
17. Pay Pro	cedures	
Co	mpetency Rating	Definition and Key Actions:
	——————————————————————————————————————	> Understands procedures related to pay,
	b Relevance ctor Rating	<ul> <li>upward/downward/lateral reclassifications, equities and stipends</li> <li>Understands approval process and proper documentation required prior to implementation in OLPPS</li> </ul>
18. Centrali	ized Pay Adjustme	nts
Co	mpetency Rating	Definition and Key Actions:
	Impetency Rating	<ul> <li>Understands the merit process and centralized automated affect on pay records</li> </ul>
	b Relevance ctor Rating	Understands range adjustments and other centralized pay adjustments that are implemented as required by the appropriate collective bargaining contract
19. Service	Calculations	
Co	mpetency Rating	Definition and Key Actions:
	b Relevance ctor Rating	<ul> <li>Ability to complete employment service calculations (from date of hire, prior UC service, State service</li> </ul>
20. Staff Ap	ppointment Admini	stration
Co	mpetency Rating	Definition and Key Actions:
		> Understands UC Personnel Programs (PSS, MSP, SMG) and the
	b Relevance ctor Rating	various appointment types such as limited vs. career

21. Separation Procedures		
	Competency Rating	
	Job Relevance Factor Rating	
22. Rep	oorting	
	Competency Rating	
	Job Relevance Factor Rating	

## Definition and Key Actions:

Understands final pay, benefits, Unemployment Insurance, Termination Report, and COBRA

#### Definition and Key Actions:

- Understanding of and ability to run and analyze WebLinks reports
- Ability to request and analyze reports from the Personnel Database (PDB) (This only applies to School of Medicine, HR Practitioners)

## 3. COMPENSATION

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23. Job Evaluation	
Competency Rating	Definition and Key Actions:
Job Relevance Factor Rating	<ul> <li>Ability to interpret and apply basic job evaluation and classification standards</li> </ul>
24. Salary Administration	
Competency Rating	Definition and Key Actions:  ➤ Ability to apply basic salary administration principles including
Job Relevance Factor Rating	administration of pay sensitive to performance, education, experience, and internal/external pay practices
25. Quantitative Analysis	
	Definition and Key Actions:
Competency Rating	<ul> <li>Ability to perform basic quantitative functions related to calculating pay increases, conducting equity reviews and comparing internal/external market pay points</li> </ul>
Job Relevance	<ul> <li>Understands salary range positions and basic statistical analysis</li> </ul>
Factor Rating	<ul> <li>Ability to effectively communicate basic quantitative data</li> </ul>
26. Regulatory Issues	
Competency Rating	Definition and Key Actions:
	Understanding of and ability to apply key laws (i.e. FLSA and
Job Relevance Factor Rating	Equal Pay), UCSF/departmental policies, and collective bargaining agreements related to compensation
27. Technical Processes	
	Definition and Key Actions:
Competency Rating	Effectively utilizes the organization's technical processes related to compensation including but not limited to:
	• OLPPS
	■ Title and Pay Plan
Job Relevance	<ul> <li>WebLinks</li> <li>Online Offer Letter System</li> </ul>
Factor Rating	<ul> <li>Online Offer Letter System</li> <li>Hiring Authority Matrix</li> </ul>
	<ul> <li>Excel and other compensation-related software applications</li> </ul>
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28. Rewards and Recognition	1
	Definition and Key Actions:
Competency Rating	Understands and/or identifies the relationship(s) between the organization's goals and values and Recognition and Reward programs
	Develops well defined processes and criteria that meet intended business and development needs and effectively communicates
	the purpose(s) of these programs, their processes, and their criteria to all eligible staff
Job Relevance Factor Rating	Develops and administers Recognition and Rewards programs so that they work within pre-established cost parameters
	<ul> <li>Ability to train managers and supervisors so they can support programs by making appropriate recommendations</li> </ul>
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# 4. STAFFING

29. Classification Principles	
Competency Rating	Definition and Key Actions:
	Knowledge of UC classification principles, practices, and available tools
Job Relevance Factor Rating	<ul> <li>Ability to write job descriptions using UC classification principles</li> </ul>
30. Marketing	Primity to write job decemptions doing to classification primorpies
oor markoming	Definition and Key Actions:
Competency Rating	<ul> <li>Understands the organization's Total Compensation package for prospective candidates as well as available recruitment techniques</li> </ul>
Job Relevance Factor Rating	<ul> <li>Uses creative and innovative approaches to effectively market the University as an employer of choice</li> </ul>
31. Staffing Strategies	
	Definition and Key Actions:
Competency Rating	<ul> <li>Knowledge of the UCSF/Department's structure and ability to provide advice to managers on staffing strategies to meet goals aligned with UCSF/Department's mission</li> </ul>
Job Relevance Factor Rating	<ul> <li>Ability to develop and implement an Affirmative Action and Diversity Plan to meet departmental and University wide goals</li> </ul>
32. Recruitment Cycle	
Competency Rating	Definition and Key Actions:
Job Relevance Factor Rating	<ul> <li>Understands the full recruitment cycle—from sourcing (posting, advertising, and outreach) to reference checking—including records retention</li> <li>Understands how to obtain departmental affirmative action goals and can advise managers on outreach activities to draw a diverse pool of candidates</li> </ul>
33. Interview Process	
Competency Rating	Definition and Key Actions:  ➤ Understands and advises managers on the interview process
	<ul> <li>Understands and advises managers on the interview process including creation of an interview panel, choosing interview questions that elicit desired information and how to fairly select the most qualified applicants.</li> </ul>
Job Relevance Factor Rating	Has a solid understanding of legal "do's and don'ts" regarding the interview process and advises managers in this area

34. Employment Decision Pro	cess
Competency Rating	<ul> <li>Definition and Key Actions:</li> <li>Understands and can advise managers on tools/resources that aid in fair and consistent practices in determining the most</li> </ul>
Job Relevance Factor Rating	qualified candidate.
35. Preferential Candidates	
Competency Rating	Definition and Key Actions:
Componently rearing	(Preferential Candidates include Recall, Priority Reassignment and Preferential Layoff Candidates.)
Job Relevance Factor Rating	Understands UC policies and collective bargaining agreements regarding preferential candidates and advises managers when a such a candidate is to be considered

# 5. EMPLOYEE RELATIONS

36. Pers	36. Personnel Policies for Staff Members (PPSM)		
		Definition and Key Actions:	
	Competency Rating	Familiarity with and understanding of the provisions of the PPSM and related campus guidelines and procedures	
	Job Relevance	Ability to apply PPSM policies and guidelines and/or recognize the need to consult with Human Resources, Labor & Employee Relations	
	Factor Rating	<ul> <li>General understanding of the rights of non-represented employees under the PPSM's Complaint Resolution Process</li> </ul>	
37. Fed	eral and State Employ	ment Laws	
		Definition and Key Actions:	
	Competency Rating	Demonstrates knowledge of key principles of Federal and State Employment laws and polices as they apply to the employees' relationship with UCSF, including:	
		<ul> <li>Title VII of the Civil Rights Act of 1964</li> </ul>	
	Job Relevance Factor Rating	<ul> <li>Fair Employment and Housing Act (FEHA)</li> <li>Americans with Disabilities Act (ADA)</li> <li>Family and Medical Leave Act (FMLA)</li> <li>Pregnancy Disability Leave (PDL)</li> <li>California Family Rights Act (CFRA) and other leave laws</li> <li>Fair Labor Standards Act (FLSA) and other wage and hour laws</li> </ul>	
38. UC	HR Policy		
		Definition and Key Actions:	
	Competency Rating	Familiarity with and understanding of other University policies including UCSF Code of Conduct, Zero Tolerance for Violence in the Work Place Policy, policies addressing the confidentiality of	
	Job Relevance	information, UC Whistleblower Policy and Whistleblower Protection Policy	
	Factor Rating	<ul> <li>Ability to understand, interpret and apply UC policies and practices and advise employees and managers in this area</li> </ul>	

39. Per	formance Management	
	Competency Rating	Definition and Key Actions:  ➤ Knowledge of current performance management models, trends, and tools
	Job Relevance Factor Rating	Ability to advise managers on performance management concepts such as setting clear expectations, providing coaching and feedback, rewarding good performance and addressing performance problems
40. Em	ployee Rights	
	Competency Rating	<ul> <li>Definition and Key Actions:</li> <li>Understanding of and ability to advise managers on public employee "due process" and "property" rights in their jobs,</li> </ul>
	Job Relevance Factor Rating	including circumstances under which employees are entitled to a review of an employment action prior to it being taken (Skelly Rights)
41. Inve	estigation Procedures	
	Competency Rating	Definition and Key Actions:
	Job Relevance Factor Rating	Ability to conduct or advise supervisors/managers on how to conduct workplace investigations

# 6. LABOR RELATIONS

	C. LABOR RELATIONS
42. Relationship Between the	University and a Union
Competency Rating	Definition and Key Actions:  ➤ General understanding of the relationship between the University and a union, including what it means when a union is recognized
Job Relevance Factor Rating	as the "exclusive representative" of employees and the limitations on managers/supervisors to engage in "direct dealing" with employees
43. Collective Bargaining Ag	reements
Competency Rating	Definition and Key Actions:
	<ul> <li>General understanding and familiarity with collective bargaining agreements and the subjects covered in the these agreements</li> </ul>
	Ability to advise supervisors/managers on the interpretation of provisions of collective bargaining agreements
Job Relevance Factor Rating	<ul> <li>Ability to advise on what occurs when a collective bargaining agreement expires (status quo)</li> </ul>
	<ul> <li>Ability to recognize the need to consult Human Resources, Labor &amp; Employee Relations</li> </ul>
44. HEERA (Higher Education	n Employer-Employee Relations Act)
Competency Rating	Definition and Key Actions:
Job Relevance Factor Rating	General understanding of HEERA
45. Bargaining Units	
Competency Rating	Definition and Key Actions:
Job Relevance	Understands the concept of a "bargaining unit," how bargaining units are defined, and the role of union stewards and representatives
Factor Rating	Ability to promote and engage in positive working relationships with individuals serving in those roles
46. Negotiation Procedures	
Competency Rating	Definition and Key Actions:
Job Relevance Factor Rating	<ul> <li>Understands of the difference between an obligation to "meet and discuss" versus "meet and confer" (negotiate)</li> </ul>
47. Weingarten Rights	
Competency Rating	Definition and Key Actions:
Job Relevance Factor Rating	<ul> <li>Understands the circumstances under which employees are entitled to have union representation in a meeting (Weingarten Rights)</li> </ul>

Phase 1: Competency Self-Assessment

48. Grievance Procedures				
	Competency Rating			
Job Relevance Factor Rating				

Definition and Key Actions:

 Understanding of and ability to participate in grievance and arbitration procedures

# 7. BENEFITS ADMINISTRATION

49. Value of	f UC Benefits						
Col	mpetency Rating	Definition and Key Actions:					
Col	impetericy Ratilig	<ul> <li>Understands the value of the UC Retirement System (CAP, UCRP and UC Retirement Savings Programs) and the various UC Health &amp; Welfare plan options available to UC employees</li> </ul>					
	Relevance ctor Rating	<ul> <li>Ability to direct employees and managers to the tools and resources available related to these programs</li> </ul>					
		Ability to proactively advise managers on how to 'market' the value of UC benefits to recruit for and retain faculty/staff					
50. Related	Laws and UC Poli	су					
Coi	mpetency Rating	Definition and Key Actions:					
	o Relevance	Follows UC Group Insurance Regulations (GIR) and understands the GIRs are governing documents designed by the plan administrator and serve to comply with IRS regulations. Understands non-compliance could jeopardize the health plans' tax exempt status (tax savings on insurance premiums, Internal Revenue Code 125)					
Factor Rating	Complies with Federal and State Laws when administering COBRA and understands a Benefits Representative's responsibility in complying with the new privacy and security laws under the Health Insurance Portability and Accountability Act (HIPAA)						
51. BELI (B	enefits Eligibility L	evel Indicator)					
Coi	mpetency Rating	Definition and Key Actions:					
	o Relevance ctor Rating	Understands BELI assignment and how it applies to benefits eligibility and is able to advise employees and managers on BELI management					
52. PIE (Per	riod of Initial Eligib	ility)					
Col	mpetency Rating	Definition and Key Actions:					
		Understands the concept of PIE and enrollment deadlines and					
	Relevance ctor Rating	can advise employees and managers regarding qualifying events that may lead to a PIE					
53. Service	Credit						
Coi	mpetency Rating	Definition and Key Actions:					
	. , ,	Understands and is able to advise employees and managers on the difference between retirement service credit, milestone event					
	Relevance ctor Rating	service credit, and service credit for vacation and sick leave accruals					

54. Dis	54. Disability Insurance Procedures					
	Competency Rating	Defini ≽				
	Job Relevance Factor Rating	>				

Definition and Key Actions:

- Understands and follows UC policy and guidelines regarding disability insurance claims procedures and is able to advise employees and managers on this
- Understands the difference between short term and supplemental disability insurance, understands the disability plan's waiting period requirement and is able to advise employees and managers on this

# 8. WORKERS COMPENSATION AND DISABILITY MANAGEMENT

55. Return to Work and Reason	onable Accommodation						
Competency Rating	Definition and Key Actions:						
Job Relevance	Ability to coordinate return to work and reasonable accommodation services for occupationally and non- occupationally injured/disabled employees to enhance						
Factor Rating	productivity, reduce lost time and avoid/reduce grievances and settlements						
56. Workers Compensation S	tatutes						
Competency Rating	Definition and Key Actions:						
Job Relevance Factor Rating	<ul> <li>Knowledge of applicable worker's compensation statutes, State (FEHA) and Federal laws (ADA), and UC policies as they relate to disability management</li> </ul>						
57. Workers Compensation P	rocess						
Competency Rating	Definition and Key Actions:						
. , ,	<ul> <li>Knowledge of actions that must be initiated and the processes</li> </ul>						
Job Relevance Factor Rating	that must be followed when an employee has a work related injury						
58. Workers Compensation P	ayroll Procedures						
Competency Rating	Definition and Key Actions:						
Job Relevance Factor Rating	Ability to implement UC policies and procedures regarding the Supplemental Sick Leave and Vacation Leave program. Extended Sick Leave, Contingency Fund, and accruals for employees receiving Total Temporary Disability (TTD) payments from workers' compensation						
59. Disability Management Co	onsultation						
Competency Rating	Definition and Key Actions:						
. , ,	Ability to provide consultation to supervisors regarding workplace disability prevention, absence management, the interactive						
Job Relevance Factor Rating	process, reasonable accommodation and UC policy as it relates to employment issues						
60. Early Intervention							
Competency Rating	Definition and Key Actions:  > Ability to recognize trends in disability and to target early						
Job Relevance	intervention programs/services						
Factor Rating	Understands where to find resources to support early intervention						
61. Promotion of Safety							
Competency Rating	Definition and Key Actions:						
Job Relevance Factor Rating	Ability to identify workplace hazards and maintain a safe work environment to mitigate risk and potential liability						

#### **Assessment Results:**

Please review the outcomes in column 'D'. Outcomes equal to 9 were rated as low skill or confidence but very important, so when creating your development plan, it would be wise to focus on these areas first, outcomes equal to 6 second, outcomes equal to 4 third, and so on. A list of current training and resources is listed to the right of each competency area for your reference.

#### **Competency Ratings:**

- 1 = Skillful and confident Minimal development needed in this competency at this time.
- 2 = Somewhat skillful and confident Specialized development is needed in this competency.
- 3 = Low skill or confidence Overall development is needed in this competency.

#### **Job Relevance Factor:**

- 3 = Very Important Knowledge in this area is critical to my job function.
- 2 = Somewhat Important Knowledge in this area is helpful to my job function
- 1 = Low Importance Knowledge in this area is rarely needed in my job function

A. Competency	B. Competency Rating	C. Job Relevance Factor	D. Multiply # in Column 'B' by # in Column 'C'	E. Training & Resources
1. GENERAL SKILLS,	KNOWLEDGE	E AND ABIL	ITIES (SKAs)	
1. Compliance				Ethics Briefing     Working with Integrity – Ethics for the UC Community     Sexual Harassment Prevention Training     OLPPS Accountability Handbook     UCOP Records Management     Guide to FMLA     Controllers Office/Payroll
2. Communication				Effective Communication Skills     Business of Listening     Baseline Business Writing Skills     Effective Business Writing     UC Oracles Toastmasters Club     Guide to Managing HR - Communication
3. Consulting				Effective Communication Skills     Business of Listening     Guide to Managing HR - Communications
4. Coaching/Advocacy				Coaching for Improved Performance
5. Customer Orientation				Manage with C.A.R.E.     Online FAS C.A.R.E.     Ethics for the UCSF Community     Effective Communication Skills     Business of Listening     Customer Service: Critical Elements of Customer Service – available through LearnIt     Customer Service: The Everyone Matters Model – available through CompassPoint

Phase 1: Competency Self-Assessment

A. Competency	B. Competency Rating	C. Job Relevance Factor	D. Multiply # in Column 'B' by # in Column 'C'	E. Training & Resources
				Ethics Briefing
				Working with Integrity – Ethics for the UC Community
				Sexual Harassment Prevention Training
				Effective Communication Skills
6 Drafassianalian				Business of Listening
6. Professionalism				Baseline Business Writing Skills
				Customer Service: Critical Elements of Customer Service – available through LearnIt
				Customer Service: The Everyone Matters Model – available through CompassPoint
				HR Strategic Role
				Guide to Managing HR – Strategic Plan
7. Strategic Direction and				SHRM Business Education Courses     UCSE Budget Overriew
Analysis				UCSF Budget Overview     Introduction to Management
				Managing Diversity
0 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1				Problem Solving and Decision Making
8. Analytical/Problem Solving Skills				Juggling Priorities and Projects
Solving Skills				Guide to Managing HR – Conflict Resolution
				HR Development
9. Training and				Employee Development and Training
Development				Development Template
				Employee Development FAQs
40. December Management				UCOP Records Management
10. Records Management				SHRM Articles on Records Management (search for 'Records Management')
2. PAYROLL AND APP	OINTMENT A	ADMINISTR/	ATION	
				SHRM Website
11. Payroll Laws				Online Payroll Guide
				• HR.BLR.com
12. OLPPS				OLPPS Entry/Update
				OLPPS Accountability Handbook
13. OPTRS				OPTRS Training
14. PAN Reviewer				OLPPS Accountability Handbook
				New Hire Checklist
15. New Hire Procedures				New Hire Payroll Procedures
				UCSF Offer Letter Template
16. Time Reporting				OPTRS Training
Procedures				Training is being developed
17. Pay Procedures				Payroll Website
18. Centralized Pay Adjustments				OLPPS Entry/Update
19. Service Calculations				<u>3 Types of Service Defined</u>
20. Staff Appointment				OLPPS Entry/Update
Administration				·

Phase 1: Competency Self-Assessment

A. Competency	B. Competency Rating	C. Job Relevance Factor	D. Multiply # in Column 'B' by # in Column 'C'	E. Training & Resources
				BELI Workshop for DBRs;
21. Separation Procedures				OLPPS Entry/Update
22. Reporting				Weblinks
3. COMPENSATION				
23. Job Evaluation				<ul> <li>HR Compensation Fundamentals</li> <li>World At Work – External Training</li> <li>Staffing, Classification and Compensation Guidelines</li> <li>Guide to Managing HR - Classification</li> <li>Job Specifications – Not on-line; maintained in central Human Resources</li> </ul>
24. Salary Administration				<ul> <li>HR Compensation Fundamentals</li> <li>World At Work – External Training</li> <li>Staffing, Classification and Compensation Guidelines</li> <li>Guide to Managing HR - Classification</li> </ul>
25. Quantitative Analysis				<ul> <li>HR Compensation Fundamentals</li> <li>World At Work – External Training</li> <li>Employment Authority Matrix</li> </ul>
26. Regulatory Issues				<ul> <li>HR Compensation Fundamentals</li> <li>World At Work – External Training</li> <li>Fair Labor Standards Act</li> <li>Collective Bargaining Agreements related to Compensation</li> <li>University Policy related to Salary</li> </ul>
27. Technical Processes				<ul> <li>HR Compensation Fundamentals</li> <li>OLPPS Entry/Update</li> <li>Title and Pay Plan</li> <li>Offer Letter System</li> <li>Weblinks</li> </ul>
28. Rewards and Recognition				<ul> <li>HR Compensation Fundamentals</li> <li>World At Work – External Training</li> <li>Rewards &amp; Recognition Links</li> <li>Rewards &amp; Recognition Programs</li> <li>Rewards &amp; Recognition Toolkit</li> </ul>
4. STAFFING				
29. Classification Principles				Staffing, Classification & Compensation     Guidelines     Staffing & Compensation Forms
30. Marketing				Manager's Tool Kit for Recruiting     Benefits of Belonging
31. Staffing Strategies				WorkForce Planning and Employment

Phase 1: Competency Self-Assessment

A. Competency	B. Competency Rating	C. Job Relevance Factor	D. Multiply # in Column 'B' by # in Column 'C'	E. Training & Resources
		. 40101	in Solution C	Recruitment Resources on the Internet (Advertising)     Manager's Tool Kit for Recruiting     Tools for Supervisors     Diversity Tool Kit - Resource Guide     Recruitment Resources on the Internet     Retention & Rewards     Managing a Diverse Staff     Promoting Diversity through Career Development     Benefits of Belonging
32. Recruitment Cycle				Benefits of Belonging Benefits Calculator Benefits of Working at UCSF  WorkForce Planning and Employment Recruitment Resources on the Internet (Advertising) Manager's Tool Kit for Recruiting Tools for Supervisors Diversity Tool Kit - Resource Guide Recruitment Resources on the Internet Staffing & Compensation Forms Benefits of Belonging
33. Interview Process				Benefits Calculator     Benefits of Working at UCSF     WorkForce Planning and Employment     Manager's Tool Kit for Recruiting
34. Employment Decision Process  35. Preferential Candidates				WorkForce Planning and Employment     Manager's Tool Kit for Recruiting     Layoff Guide for Managers     Employee's Guide to Layoff
5. EMPLOYEE RELATI	ONS			Priority Reassignment (Formerly 'Special Selection')
36. Personal Policies for Staff Members (PPSM)				Supervising According to Union Contracts & the PPSM     Personnel Policies for Staff Members     Supervising within the Law
37. Federal and State Employment Laws				Federal & State Labor Law Mandatory     Notices     FMLA Training     Supervising According to Union Contracts & the PPSM
38. UC HR Policy				Personnel Policies for Staff Members     Delegations of Authority for Policies     Covering Staff Employees     Appendix II—Senior Management     Personnel Policies     Records Management Disposition     Schedules
39. Performance Management				<ul> <li>Coaching for Improved Performance</li> <li>Setting Performance Expectations</li> <li>Guide to Managing Human Resources - Chapter 7, Performance Management</li> <li>Performance Evaluation Form (example)</li> </ul>

Phase 1: Competency Self-Assessment

A. Competency	B. Competency Rating	C. Job Relevance Factor	D. Multiply # in Column 'B' by # in Column 'C'	Phase 1: Competency Self-Assessment  E. Training & Resources
40. Employee Rights				HR Fundamentals - Labor & Employee     Relations     Guide to Managing Human Resources –     Chapter 21, Labor & Employee Relations
41. Investigation Procedures				Guide to Managing Human Resources – Chapter 21, Labor & Employee Relations
6. LABOR RELATIONS	5			
42. Relationship between the University and Union				HR Fundamentals - Labor & Employee     Relations     Guide to Managing Human Resources —     Chapter 21, Labor & Employee Relations     Guide to Managing Human Resources —     Chapter 22, Labor Management
43. Collective Bargaining Agreements				<ul> <li>HR Fundamentals - Labor &amp; Employee         Relations</li> <li>Supervising According to Union Contracts &amp; the PPSM</li> <li>Collective Bargaining Agreements</li> </ul>
44. HEERA (Higher Education Employer – Employee Relations Act)				<ul> <li>HR Fundamentals - Labor &amp; Employee         Relations</li> <li>HEERA (At Your Service)</li> <li>Guide to Managing Human Resources —         Chapter 21, Labor &amp; Employee Relations</li> </ul>
45. Bargaining Units				<ul> <li>HR Fundamentals - Labor &amp; Employee         Relations</li> <li>The Collective Bargaining Process (At Your Service)</li> <li>Existing Bargaining Units</li> <li>Guide to Managing Human Resources — Chapter 21, Labor &amp; Employee Relations</li> </ul>
46. Negotiation Procedures				HR Fundamentals - Labor & Employee     Relations     The Negotiation Process (At Your Service)
47. Weingarten Rights				HR Fundamentals - Labor & Employee     Relations     Supervising According to Union Contracts & the PPSM     Empowering Supervisors     Guide to Managing Human Resources — Chapter 22, Labor Management
48. Grievance Procedures				HR Fundamentals - Labor & Employee     Relations     Supervising According to Union Contracts & the PPSM     Collective Bargaining Agreements –     Grievance Articles     Guide to Managing Human Resources –     Chapter 21, Labor & Employee Relations
7. BENEFITS				
49. Value of UC Benefits				HR Fundamentals – Benefits & Financial Planning     Value of UCRP Example     Hiring Manager's Script for Total Compensation
				Value of UC Benefits Calculator

Phase 1: Competency Self-Assessment

A. Competency	B. Competency Rating	C. Job Relevance Factor	D. Multiply # in Column 'B' by # in Column 'C'	E. Training & Resources
				Estimate Your UCRP Retirement Benefit     New Employee Benefits Orientation     Health & Welfare and Retirement Workshops     Your Group Insurance Plan Booklet     Benefits of Belonging     New DBR Workshop
50. Related Laws and UC Policy				<ul> <li>HR Fundamentals – Benefits &amp; Financial Planning</li> <li>UC Group Insurance Regulations</li> <li>Guide to Managing HR - Benefits</li> <li>HIPAA as related to Benefits Administration</li> <li>COBRA Requirements</li> <li>New DBR Workshop</li> <li>Benefitslink Newsletter</li> </ul>
51. BELI (Benefits Eligibility Level Indicator)				<ul> <li>BELI Reference Materials;</li> <li>BELI Workshop for DBRs;</li> <li>New DBR Workshop</li> </ul>
52. PIE (Period of Initial Eligibility)				<ul> <li>UCSF DBR Page, 'Enrollment'</li> <li>Your Group Insurance Plan Booklet, page 7;</li> <li>PIE Calculator;</li> <li>'At Your Service' - PIE</li> <li>New DBR Workshop</li> </ul>
53. Service Credit				Defined – scroll to 'Service Awards' 15th bullet     Graduated Eligibility     UCRP Service Credit Defined     New DBR Workshop
54. Disability Insurance Procedures				'AT Your Service' – Disability Insurance     Disability Workshop for DBRs     New DBR Workshop     UCSF Disability Claims Procedures     Short Term Disability Insurance SPD     Supplemental Disability Insurance SPD
8. WORKERS COMPE	NSATION AN	D DISABILI	TY MANAGEI	
55. Return to Work and Reasonable Accommodation				HR Health, Wellness and Disability     Management     National Institute of Disability Management     and Research
56. Workers Compensation Statutes				Insurance Educational Association     American with Disability Act Title II     Technical Assistance Manual     Fair Employment and Housing Act
57. Workers Compensation Process				UCSF – Workers Compensation Website
58. Workers Compensation Payroll Procedures				UCSF – Workers Compensation Website
59. Disability Management Consultation				HR Health, Wellness and Disability     Management     Insurance Educational Association     National Institute of Disability Management and Research
60. Early Intervention				HR Health, Wellness and Disability     Management
61. Promotion of Safety				Office of Environmental Health and Safety

Phase 1: Competency Self-Assessment

A. Competency Rating  C. Job Relevance Factor  D. Multiply # in Column 'B' by # in Column 'C'  E. Training & Resources	A. Competency		Relevance	Column 'B' by #	E. Training & Resources
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ADDITIONAL RESOURCES APPLICABLE TO ALL COMPETENCIES				
Job Sharing				<ul> <li>Employee Development and Training</li> <li>Development Template</li> </ul>
Buddy System				New Employee Orientation
Mentoring				<ul> <li>Coaching for Improved Performance</li> <li>ABOG Mentorship Program</li> <li>Introduction to Coaching Skills for Managers and Leaders available through CompassPoint (approx \$185)</li> </ul>
Trends in HR				<ul> <li>SHRM Website</li> <li>SHRM Certification</li> <li>Northern California Human Resources Association</li> </ul>

# **JOB DESCRIPTION**

Title:		
Classification:		
Department: (optional)		
Date:		
Please fax a copy of the Assessment Results pages, 20-26, to FAX 415/476-2328. We are asking you to fax the assessment results so that we may gather statistical data to determine what competency areas to focus on first when developing new training modules.		
Thank you for taking this additional step. If you have questions at all please contact, Pamela Hayes, 415/476-6389, <a href="mailto:pamela.hayes@ucsf.edu">pamela.hayes@ucsf.edu</a>		
Please Share your thoughts/suggestions regarding this new development plan process for HR practitioners.		