

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

- 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.*

Job Relevance Factor Key

- 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 |

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

2. Communication

| | |
|--|------------------------------------|
| | Competency Rating |
| | Job Relevance Factor Rating |

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

3. Consulting

| | |
|--|------------------------------------|
| | 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

| | |
|--|------------------------------------|
| | Competency Rating |
| | Job Relevance Factor Rating |

Definition and Key Actions:

- Ability to manage and support change
- Works to improve effectiveness of teamwork
- Ability to mentor supervisors/managers in coaching their employees
- Initiates methods to promote diversity awareness

5. Customer Service Orientation

| | |
|--|------------------------------------|
| | Competency Rating |
| | Job Relevance Factor Rating |

Definition and Key Actions:

- Ability to understand customer expectations and requirements and to use available resources, policies, and opportunities to support customers while upholding institutional values
- Ability to support and apply customer service standards such as collaboration, accountability, responsiveness and efficiency in everyday business transactions

6. Professionalism

| | |
|--|------------------------------------|
| | Competency Rating |
| | Job Relevance Factor Rating |

Definition and Key Actions:

- Ability to maintain a professional demeanor in difficult or stressful situations
- Maintains patience with clients, demonstrates integrity, maintains confidentiality, demonstrates political acumen

7. Strategic Direction and Analysis

| | |
|--|------------------------------------|
| | Competency Rating |
| | Job Relevance Factor Rating |

Definition and Key Actions:

- Demonstrates an understanding of UCSF's organizational direction, culture, business challenges, priorities and needs
- Ensures that services are aligned with business direction and 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 |
| | Job Relevance Factor Rating |

Definition and Key Actions:

- Ability to think analytically and grasp complex concepts
- Ability to develop realistic strategies and options when faced with challenging situations
- Ability to diffuse and mitigate conflict and focus on business solutions
- Ability to effectively and consistently negotiate complex issues until the best possible outcome for the University is achieved

9. Training and Development

| | |
|--|------------------------------------|
| | Competency Rating |
| | Job Relevance Factor Rating |

Definition and Key Actions:

- 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
- Supports and encourages the professional growth of employees
- Ability to advise employees and supervisors/managers on best development options to meet desired outcomes

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

| | | |
|--------------------------------|------------------------------------|---|
| 11. Payroll Laws | | |
| | Competency Rating | <i>Definition and Key Actions:</i> |
| | Job Relevance Factor Rating | |
| | | ➤ Knowledge and understanding of payroll laws & UC policies as they relate to UC payroll processes |
| 12. OLPPS | | |
| | Competency Rating | <i>Definition and Key Actions:</i> |
| | Job Relevance Factor Rating | |
| | | ➤ Certified in OLPPS Entry/Update and has working knowledge of OLPPS mechanics (inquiry, entry and update) |
| 13. OPTRS | | |
| | Competency Rating | <i>Definition and Key Actions:</i> |
| | Job Relevance Factor Rating | |
| | | ➤ Certified in OPTRS Entry/Update and has working knowledge of OPTRS mechanics (entry and update) |
| 14. PAN Reviewer | | |
| | Competency Rating | <i>Definition and Key Actions:</i> |
| | Job Relevance Factor Rating | |
| | | ➤ Understands the PAN reviewer processes and responsibilities |
| 15. New Hire Procedures | | |
| | Competency Rating | <i>Definition and Key Actions:</i> |
| | Job Relevance Factor Rating | |
| | | ➤ Understands new hire procedures: <ul style="list-style-type: none"> ▪ Knowledge of documents that are included in a new hire packet ▪ Understands the process for campus or departmental transfers ▪ Understands which original documents are retained in the departmental personnel file vs. sent to Payroll ▪ Knowledge of time deadlines for critical documents (I-9; Oath/Patent) ▪ 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 |

16. Time Reporting Procedures

| | | |
|--|------------------------------------|--|
| | Competency Rating | <i>Definition and Key Actions:</i> <ul style="list-style-type: none"> ➤ 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) ➤ Understands procedures and payout related to overtime, comp time, time on-call, and holiday pay for all classes of employees under current purview ➤ Understands the "Time Benefits Roster" and reporting vacation/sick leave hours on the "Leave Reporting Worksheet" (and the timing of both each month) ➤ Ability to train departmental employees on timesheet procedures and to assist employees with questions related to pay and Sure pay statements |
| | Job Relevance Factor Rating | |

17. Pay Procedures

| | | |
|--|------------------------------------|---|
| | Competency Rating | <i>Definition and Key Actions:</i> <ul style="list-style-type: none"> ➤ Understands procedures related to pay, upward/downward/lateral reclassifications, equities and stipends ➤ Understands approval process and proper documentation required prior to implementation in OLPPS |
| | Job Relevance Factor Rating | |

18. Centralized Pay Adjustments

| | | |
|--|------------------------------------|--|
| | Competency Rating | <i>Definition and Key Actions:</i> <ul style="list-style-type: none"> ➤ Understands the merit process and centralized automated affect on pay records ➤ Understands range adjustments and other centralized pay adjustments that are implemented as required by the appropriate collective bargaining contract |
| | Job Relevance Factor Rating | |

19. Service Calculations

| | | |
|--|------------------------------------|---|
| | Competency Rating | <i>Definition and Key Actions:</i> <ul style="list-style-type: none"> ➤ Ability to complete employment service calculations (from date of hire, prior UC service, State service) |
| | Job Relevance Factor Rating | |

20. Staff Appointment Administration

| | | |
|--|------------------------------------|---|
| | Competency Rating | <i>Definition and Key Actions:</i> <ul style="list-style-type: none"> ➤ Understands UC Personnel Programs (PSS, MSP, SMG) and the various appointment types such as limited vs. career |
| | Job Relevance Factor Rating | |

| 21. Separation Procedures | |
|----------------------------------|------------------------------------|
| | Competency Rating |
| | Job Relevance Factor Rating |
| 22. Reporting | |
| | 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

| | | |
|----------------------------------|------------------------------------|---|
| 23. Job Evaluation | | |
| | Competency Rating | <i>Definition and Key Actions:</i> |
| | Job Relevance Factor Rating | |
| | | <ul style="list-style-type: none"> ➤ Ability to interpret and apply basic job evaluation and classification standards |
| 24. Salary Administration | | |
| | Competency Rating | <i>Definition and Key Actions:</i> |
| | Job Relevance Factor Rating | |
| | | <ul style="list-style-type: none"> ➤ Ability to apply basic salary administration principles including administration of pay sensitive to performance, education, experience, and internal/external pay practices |
| 25. Quantitative Analysis | | |
| | Competency Rating | <i>Definition and Key Actions:</i> |
| | Job Relevance Factor Rating | |
| | | <ul style="list-style-type: none"> ➤ Ability to perform basic quantitative functions related to calculating pay increases, conducting equity reviews and comparing internal/external market pay points ➤ Understands salary range positions and basic statistical analysis ➤ Ability to effectively communicate basic quantitative data |
| 26. Regulatory Issues | | |
| | Competency Rating | <i>Definition and Key Actions:</i> |
| | Job Relevance Factor Rating | |
| | | <ul style="list-style-type: none"> ➤ Understanding of and ability to apply key laws (i.e. FLSA and Equal Pay), UCSF/departmental policies, and collective bargaining agreements related to compensation |
| 27. Technical Processes | | |
| | Competency Rating | <i>Definition and Key Actions:</i> |
| | Job Relevance Factor Rating | |
| | | <ul style="list-style-type: none"> ➤ Effectively utilizes the organization's technical processes related to compensation including but not limited to: <ul style="list-style-type: none"> ▪ OLPPS ▪ Title and Pay Plan ▪ WebLinks ▪ Online Offer Letter System ▪ Hiring Authority Matrix ▪ Excel and other compensation-related software applications |

28. Rewards and Recognition

| | | |
|--|------------------------------------|--|
| | Competency Rating | <p><i>Definition and Key Actions:</i></p> <ul style="list-style-type: none"> ➤ 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 ➤ Develops and administers Recognition and Rewards programs so that they work within pre-established cost parameters ➤ Ability to train managers and supervisors so they can support programs by making appropriate recommendations |
| | Job Relevance Factor Rating | |

4. STAFFING

| 29. Classification Principles | | |
|-------------------------------|------------------------------------|--|
| | Competency Rating | <i>Definition and Key Actions:</i> <ul style="list-style-type: none"> ➤ Knowledge of UC classification principles, practices, and available tools ➤ Ability to write job descriptions using UC classification principles |
| | Job Relevance Factor Rating | |
| 30. Marketing | | |
| | Competency Rating | <i>Definition and Key Actions:</i> <ul style="list-style-type: none"> ➤ Understands the organization's Total Compensation package for prospective candidates as well as available recruitment techniques ➤ Uses creative and innovative approaches to effectively market the University as an employer of choice |
| | Job Relevance Factor Rating | |
| 31. Staffing Strategies | | |
| | Competency Rating | <i>Definition and Key Actions:</i> <ul style="list-style-type: none"> ➤ 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 ➤ Ability to develop and implement an Affirmative Action and Diversity Plan to meet departmental and University wide goals |
| | Job Relevance Factor Rating | |
| 32. Recruitment Cycle | | |
| | Competency Rating | <i>Definition and Key Actions:</i> <ul style="list-style-type: none"> ➤ Understands the full recruitment cycle—from sourcing (posting, advertising, and outreach) to reference checking—including records retention ➤ Understands how to obtain departmental affirmative action goals and can advise managers on outreach activities to draw a diverse pool of candidates |
| | Job Relevance Factor Rating | |
| 33. Interview Process | | |
| | Competency Rating | <i>Definition and Key Actions:</i> <ul style="list-style-type: none"> ➤ 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. ➤ Has a solid understanding of legal "do's and don'ts" regarding the interview process and advises managers in this area |
| | Job Relevance Factor Rating | |

34. Employment Decision Process

| | | |
|--|------------------------------------|---|
| | Competency Rating | <i>Definition and Key Actions:</i> ➤ Understands and can advise managers on tools/resources that aid in fair and consistent practices in determining the most qualified candidate. |
| | Job Relevance Factor Rating | |

35. Preferential Candidates

| | | |
|--|------------------------------------|--|
| | Competency Rating | <i>Definition and Key Actions:</i> (Preferential Candidates include Recall, Priority Reassignment and Preferential Layoff Candidates.) ➤ Understands UC policies and collective bargaining agreements regarding preferential candidates and advises managers when a such a candidate is to be considered |
| | Job Relevance Factor Rating | |

5. EMPLOYEE RELATIONS

36. Personnel Policies for Staff Members (PPSM)

| | | |
|--|------------------------------------|---|
| | Competency Rating | <i>Definition and Key Actions:</i> <ul style="list-style-type: none"> ➤ Familiarity with and understanding of the provisions of the PPSM and related campus guidelines and procedures ➤ Ability to apply PPSM policies and guidelines and/or recognize the need to consult with Human Resources, Labor & Employee Relations ➤ General understanding of the rights of non-represented employees under the PPSM's Complaint Resolution Process |
| | Job Relevance Factor Rating | |

37. Federal and State Employment Laws

| | | |
|--|------------------------------------|--|
| | Competency Rating | <i>Definition and Key Actions:</i> <ul style="list-style-type: none"> ➤ Demonstrates knowledge of key principles of Federal and State Employment laws and polices as they apply to the employees' relationship with UCSF, including: <ul style="list-style-type: none"> ▪ Title VII of the Civil Rights Act of 1964 ▪ Fair Employment and Housing Act (FEHA) ▪ Americans with Disabilities Act (ADA) ▪ Family and Medical Leave Act (FMLA) ▪ Pregnancy Disability Leave (PDL) ▪ California Family Rights Act (CFRA) and other leave laws ▪ Fair Labor Standards Act (FLSA) and other wage and hour laws |
| | Job Relevance Factor Rating | |

38. UC HR Policy

| | | |
|--|------------------------------------|---|
| | Competency Rating | <i>Definition and Key Actions:</i> <ul style="list-style-type: none"> ➤ 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 information, UC Whistleblower Policy and Whistleblower Protection Policy ➤ Ability to understand, interpret and apply UC policies and practices and advise employees and managers in this area |
| | Job Relevance Factor Rating | |

39. Performance Management

| | |
|--|------------------------------------|
| | Competency Rating |
| | Job Relevance Factor Rating |

Definition and Key Actions:

- Knowledge of current performance management models, trends, and tools
- 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. Employee Rights

| | |
|--|------------------------------------|
| | Competency Rating |
| | Job Relevance Factor Rating |

Definition and Key Actions:

- Understanding of and ability to advise managers on public employee “due process” and “property” rights in their jobs, including circumstances under which employees are entitled to a review of an employment action prior to it being taken (Skelly Rights)

41. Investigation Procedures

| | |
|--|------------------------------------|
| | Competency Rating |
| | Job Relevance Factor Rating |

Definition and Key Actions:

- Ability to conduct or advise supervisors/managers on how to conduct workplace investigations

6. LABOR RELATIONS

42. Relationship Between the University and a Union

| | | |
|--|------------------------------------|--|
| | Competency Rating | <i>Definition and Key Actions:</i> ➤ General understanding of the relationship between the University and a union, including what it means when a union is recognized as the "exclusive representative" of employees and the limitations on managers/supervisors to engage in "direct dealing" with employees |
| | Job Relevance Factor Rating | |

43. Collective Bargaining Agreements

| | | |
|--|------------------------------------|--|
| | Competency Rating | <i>Definition and Key Actions:</i> ➤ General understanding and familiarity with collective bargaining agreements and the subjects covered in the these agreements ➤ Ability to advise supervisors/managers on the interpretation of provisions of collective bargaining agreements ➤ Ability to advise on what occurs when a collective bargaining agreement expires (status quo) ➤ Ability to recognize the need to consult Human Resources, Labor & Employee Relations |
| | Job Relevance Factor Rating | |

44. HEERA (Higher Education Employer-Employee Relations Act)

| | | |
|--|------------------------------------|--|
| | Competency Rating | <i>Definition and Key Actions:</i> ➤ General understanding of HEERA |
| | Job Relevance Factor Rating | |

45. Bargaining Units

| | | |
|--|------------------------------------|---|
| | Competency Rating | <i>Definition and Key Actions:</i> ➤ Understands the concept of a "bargaining unit," how bargaining units are defined, and the role of union stewards and representatives ➤ Ability to promote and engage in positive working relationships with individuals serving in those roles |
| | Job Relevance Factor Rating | |

46. Negotiation Procedures

| | | |
|--|------------------------------------|--|
| | Competency Rating | <i>Definition and Key Actions:</i> ➤ Understands of the difference between an obligation to "meet and discuss" versus "meet and confer" (negotiate) |
| | Job Relevance Factor Rating | |

47. Weingarten Rights

| | | |
|--|------------------------------------|--|
| | Competency Rating | <i>Definition and Key Actions:</i> ➤ Understands the circumstances under which employees are entitled to have union representation in a meeting (Weingarten Rights) |
| | Job Relevance Factor Rating | |

| 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 UC Benefits | | |
|---|------------------------------------|--|
| | Competency Rating | <i>Definition and Key Actions:</i> <ul style="list-style-type: none"> ➤ Understands the value of the UC Retirement System (CAP, UCRP and UC Retirement Savings Programs) and the various UC Health & Welfare plan options available to UC employees ➤ Ability to direct employees and managers to the tools and resources available related to these programs ➤ Ability to proactively advise managers on how to 'market' the value of UC benefits to recruit for and retain faculty/staff |
| | Job Relevance Factor Rating | |
| 50. Related Laws and UC Policy | | |
| | Competency Rating | <i>Definition and Key Actions:</i> <ul style="list-style-type: none"> ➤ 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) ➤ 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) |
| | Job Relevance Factor Rating | |
| 51. BELI (Benefits Eligibility Level Indicator) | | |
| | Competency Rating | <i>Definition and Key Actions:</i> <ul style="list-style-type: none"> ➤ Understands BELI assignment and how it applies to benefits eligibility and is able to advise employees and managers on BELI management |
| | Job Relevance Factor Rating | |
| 52. PIE (Period of Initial Eligibility) | | |
| | Competency Rating | <i>Definition and Key Actions:</i> <ul style="list-style-type: none"> ➤ Understands the concept of PIE and enrollment deadlines and can advise employees and managers regarding qualifying events that may lead to a PIE |
| | Job Relevance Factor Rating | |
| 53. Service Credit | | |
| | Competency Rating | <i>Definition and Key Actions:</i> <ul style="list-style-type: none"> ➤ Understands and is able to advise employees and managers on the difference between retirement service credit, milestone event service credit, and service credit for vacation and sick leave accruals |
| | Job Relevance Factor Rating | |

54. Disability Insurance Procedures

| | | |
|--|------------------------------------|--|
| | Competency Rating | <i>Definition and Key Actions:</i> <ul style="list-style-type: none">➤ 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 |
| | Job Relevance Factor Rating | |

8. WORKERS COMPENSATION AND DISABILITY MANAGEMENT

55. Return to Work and Reasonable Accommodation

| | | |
|--|------------------------------------|---|
| | Competency Rating | <i>Definition and Key Actions:</i> ➤ Ability to coordinate return to work and reasonable accommodation services for occupationally and non-occupationally injured/disabled employees to enhance productivity, reduce lost time and avoid/reduce grievances and settlements |
| | Job Relevance Factor Rating | |

56. Workers Compensation Statutes

| | | |
|--|------------------------------------|--|
| | Competency Rating | <i>Definition and Key Actions:</i> ➤ Knowledge of applicable worker's compensation statutes, State (FEHA) and Federal laws (ADA), and UC policies as they relate to disability management |
| | Job Relevance Factor Rating | |

57. Workers Compensation Process

| | | |
|--|------------------------------------|--|
| | Competency Rating | <i>Definition and Key Actions:</i> ➤ Knowledge of actions that must be initiated and the processes that must be followed when an employee has a work related injury |
| | Job Relevance Factor Rating | |

58. Workers Compensation Payroll Procedures

| | | |
|--|------------------------------------|--|
| | Competency Rating | <i>Definition and Key Actions:</i> ➤ 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 |
| | Job Relevance Factor Rating | |

59. Disability Management Consultation

| | | |
|--|------------------------------------|--|
| | Competency Rating | <i>Definition and Key Actions:</i> ➤ Ability to provide consultation to supervisors regarding workplace disability prevention, absence management, the interactive process, reasonable accommodation and UC policy as it relates to employment issues |
| | Job Relevance Factor Rating | |

60. Early Intervention

| | | |
|--|------------------------------------|---|
| | Competency Rating | <i>Definition and Key Actions:</i> ➤ Ability to recognize trends in disability and to target early intervention programs/services ➤ Understands where to find resources to support early intervention |
| | Job Relevance Factor Rating | |

61. Promotion of Safety

| | | |
|--|------------------------------------|---|
| | Competency Rating | <i>Definition and Key Actions:</i> ➤ Ability to identify workplace hazards and maintain a safe work environment to mitigate risk and potential liability |
| | Job Relevance Factor Rating | |

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 AND ABILITIES (SKAs) | | | | |
| 1. Compliance | | | | <ul style="list-style-type: none"> • 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 | | | | <ul style="list-style-type: none"> • Effective Communication Skills • Business of Listening • Baseline Business Writing Skills • Effective Business Writing • UC Oracles Toastmasters Club • Guide to Managing HR - Communication |
| 3. Consulting | | | | <ul style="list-style-type: none"> • Effective Communication Skills • Business of Listening • Guide to Managing HR - Communications |
| 4. Coaching/Advocacy | | | | <ul style="list-style-type: none"> • Coaching for Improved Performance |
| 5. Customer Orientation | | | | <ul style="list-style-type: none"> • 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 |

Individual Development Planning
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 |
|--|----------------------|-------------------------|--|---|
| 6. Professionalism | | | | <ul style="list-style-type: none"> • Ethics Briefing • Working with Integrity – Ethics for the UC Community • Sexual Harassment Prevention Training • Effective Communication Skills • Business of Listening • Baseline Business Writing Skills • Customer Service: Critical Elements of Customer Service – available through LearnIt • Customer Service: The Everyone Matters Model – available through CompassPoint |
| 7. Strategic Direction and Analysis | | | | <ul style="list-style-type: none"> • HR Strategic Role • Guide to Managing HR – Strategic Plan • SHRM Business Education Courses • UCSF Budget Overview • Introduction to Management • Managing Diversity |
| 8. Analytical/Problem Solving Skills | | | | <ul style="list-style-type: none"> • Problem Solving and Decision Making • Juggling Priorities and Projects • Guide to Managing HR – Conflict Resolution |
| 9. Training and Development | | | | <ul style="list-style-type: none"> • HR Development • Employee Development and Training • Development Template • Employee Development FAQs |
| 10. Records Management | | | | <ul style="list-style-type: none"> • UCOP Records Management • SHRM Articles on Records Management (search for 'Records Management') |
| 2. PAYROLL AND APPOINTMENT ADMINISTRATION | | | | |
| 11. Payroll Laws | | | | <ul style="list-style-type: none"> • SHRM Website • Online Payroll Guide • HR.BLR.com |
| 12. OLPPS | | | | <ul style="list-style-type: none"> • OLPPS Entry/Update • OLPPS Accountability Handbook |
| 13. OPTRS | | | | <ul style="list-style-type: none"> • OPTRS Training |
| 14. PAN Reviewer | | | | <ul style="list-style-type: none"> • OLPPS Accountability Handbook |
| 15. New Hire Procedures | | | | <ul style="list-style-type: none"> • New Hire Checklist • New Hire Payroll Procedures • UCSF Offer Letter Template |
| 16. Time Reporting Procedures | | | | <ul style="list-style-type: none"> • OPTRS Training • Training is being developed |
| 17. Pay Procedures | | | | <ul style="list-style-type: none"> • Payroll Website |
| 18. Centralized Pay Adjustments | | | | <ul style="list-style-type: none"> • OLPPS Entry/Update |
| 19. Service Calculations | | | | <ul style="list-style-type: none"> • 3 Types of Service Defined |
| 20. Staff Appointment Administration | | | | <ul style="list-style-type: none"> • OLPPS Entry/Update • BELI Reference Materials |

Individual Development Planning
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 |
|-------------------------------|----------------------|-------------------------|--|---|
| | | | | <ul style="list-style-type: none"> • BELI Workshop for DBRs; |
| 21. Separation Procedures | | | | <ul style="list-style-type: none"> • OLPPS Entry/Update |
| 22. Reporting | | | | <ul style="list-style-type: none"> • Weblinks |
| 3. COMPENSATION | | | | |
| 23. Job Evaluation | | | | <ul style="list-style-type: none"> • HR Compensation Fundamentals • World At Work – External Training • Staffing, Classification and Compensation Guidelines • Guide to Managing HR - Classification • Job Specifications – Not on-line; maintained in central Human Resources |
| 24. Salary Administration | | | | <ul style="list-style-type: none"> • HR Compensation Fundamentals • World At Work – External Training • Staffing, Classification and Compensation Guidelines • Guide to Managing HR - Classification |
| 25. Quantitative Analysis | | | | <ul style="list-style-type: none"> • HR Compensation Fundamentals • World At Work – External Training • Employment Authority Matrix |
| 26. Regulatory Issues | | | | <ul style="list-style-type: none"> • HR Compensation Fundamentals • World At Work – External Training • Fair Labor Standards Act • Collective Bargaining Agreements related to Compensation • University Policy related to Salary |
| 27. Technical Processes | | | | <ul style="list-style-type: none"> • HR Compensation Fundamentals • OLPPS Entry/Update • Title and Pay Plan • Offer Letter System • Weblinks |
| 28. Rewards and Recognition | | | | <ul style="list-style-type: none"> • HR Compensation Fundamentals • World At Work – External Training • Rewards & Recognition Links • Rewards & Recognition Programs • Rewards & Recognition Toolkit |
| 4. STAFFING | | | | |
| 29. Classification Principles | | | | <ul style="list-style-type: none"> • Staffing, Classification & Compensation Guidelines • Staffing & Compensation Forms |
| 30. Marketing | | | | <ul style="list-style-type: none"> • Manager's Tool Kit for Recruiting • Benefits of Belonging |
| 31. Staffing Strategies | | | | <ul style="list-style-type: none"> • WorkForce Planning and Employment |

Individual Development Planning
Phase 1: Competency Self-Assessment

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|--|----------------------|-------------------------|--|---|
| | | | | <ul style="list-style-type: none"> • 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 • Benefits Calculator • Benefits of Working at UCSF |
| 32. Recruitment Cycle | | | | <ul style="list-style-type: none"> • 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 • Benefits Calculator • Benefits of Working at UCSF |
| 33. Interview Process | | | | <ul style="list-style-type: none"> • WorkForce Planning and Employment • Manager's Tool Kit for Recruiting |
| 34. Employment Decision Process | | | | <ul style="list-style-type: none"> • WorkForce Planning and Employment • Manager's Tool Kit for Recruiting |
| 35. Preferential Candidates | | | | <ul style="list-style-type: none"> • Layoff Guide for Managers • Employee's Guide to Layoff • Priority Reassignment (Formerly 'Special Selection') |
| 5. EMPLOYEE RELATIONS | | | | |
| 36. Personal Policies for Staff Members (PPSM) | | | | <ul style="list-style-type: none"> • Supervising According to Union Contracts & the PPSM • Personnel Policies for Staff Members |
| 37. Federal and State Employment Laws | | | | <ul style="list-style-type: none"> • Supervising within the Law • Federal & State Labor Law Mandatory Notices • FMLA Training |
| 38. UC HR Policy | | | | <ul style="list-style-type: none"> • Supervising According to Union Contracts & the PPSM • 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 style="list-style-type: none"> • Coaching for Improved Performance • Setting Performance Expectations • Guide to Managing Human Resources - Chapter 7. Performance Management • Performance Evaluation Form (example) |

Individual Development Planning
Phase 1: Competency Self-Assessment

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|--|----------------------|-------------------------|--|--|
| 40. Employee Rights | | | | <ul style="list-style-type: none"> • HR Fundamentals - Labor & Employee Relations • Guide to Managing Human Resources – Chapter 21, Labor & Employee Relations |
| 41. Investigation Procedures | | | | <ul style="list-style-type: none"> • Guide to Managing Human Resources – Chapter 21, Labor & Employee Relations |
| 6. LABOR RELATIONS | | | | |
| 42. Relationship between the University and Union | | | | <ul style="list-style-type: none"> • 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 style="list-style-type: none"> • HR Fundamentals - Labor & Employee Relations • Supervising According to Union Contracts & the PPSM • Collective Bargaining Agreements |
| 44. HEERA (Higher Education Employer – Employee Relations Act) | | | | <ul style="list-style-type: none"> • HR Fundamentals - Labor & Employee Relations • HEERA (At Your Service) • Guide to Managing Human Resources – Chapter 21, Labor & Employee Relations |
| 45. Bargaining Units | | | | <ul style="list-style-type: none"> • HR Fundamentals - Labor & Employee Relations • The Collective Bargaining Process (At Your Service) • Existing Bargaining Units • Guide to Managing Human Resources – Chapter 21, Labor & Employee Relations |
| 46. Negotiation Procedures | | | | <ul style="list-style-type: none"> • HR Fundamentals - Labor & Employee Relations • The Negotiation Process (At Your Service) |
| 47. Weingarten Rights | | | | <ul style="list-style-type: none"> • 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 | | | | <ul style="list-style-type: none"> • 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 | | | | <ul style="list-style-type: none"> • HR Fundamentals – Benefits & Financial Planning • Value of UCRP Example • Hiring Manager's Script for Total Compensation • Value of UC Benefits Calculator |

Individual Development Planning
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|--|----------------------|-------------------------|--|--|
| | | | | <ul style="list-style-type: none"> • 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 style="list-style-type: none"> • HR Fundamentals – Benefits & Financial Planning • UC Group Insurance Regulations • Guide to Managing HR - Benefits • HIPAA as related to Benefits Administration • COBRA Requirements • New DBR Workshop • Benefitslink Newsletter |
| 51. BELI (Benefits Eligibility Level Indicator) | | | | <ul style="list-style-type: none"> • BELI Reference Materials; • BELI Workshop for DBRs; • New DBR Workshop |
| 52. PIE (Period of Initial Eligibility) | | | | <ul style="list-style-type: none"> • UCSF DBR Page,' Enrollment' • Your Group Insurance Plan Booklet, page 7; • PIE Calculator; • 'At Your Service' - PIE • New DBR Workshop |
| 53. Service Credit | | | | <ul style="list-style-type: none"> • Defined – scroll to 'Service Awards' 15th bullet • Graduated Eligibility • UCRP Service Credit Defined • New DBR Workshop |
| 54. Disability Insurance Procedures | | | | <ul style="list-style-type: none"> • '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 COMPENSATION AND DISABILITY MANAGEMENT | | | | |
| 55. Return to Work and Reasonable Accommodation | | | | <ul style="list-style-type: none"> • HR Health, Wellness and Disability Management • National Institute of Disability Management and Research |
| 56. Workers Compensation Statutes | | | | <ul style="list-style-type: none"> • Insurance Educational Association • American with Disability Act Title II Technical Assistance Manual • Fair Employment and Housing Act |
| 57. Workers Compensation Process | | | | <ul style="list-style-type: none"> • UCSF – Workers Compensation Website |
| 58. Workers Compensation Payroll Procedures | | | | <ul style="list-style-type: none"> • UCSF – Workers Compensation Website |
| 59. Disability Management Consultation | | | | <ul style="list-style-type: none"> • HR Health, Wellness and Disability Management • Insurance Educational Association • National Institute of Disability Management and Research |
| 60. Early Intervention | | | | <ul style="list-style-type: none"> • HR Health, Wellness and Disability Management |
| 61. Promotion of Safety | | | | <ul style="list-style-type: none"> • Office of Environmental Health and Safety |

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|---------------|----------------------|-------------------------|--|-------------------------|
|---------------|----------------------|-------------------------|--|-------------------------|

| ADDITIONAL RESOURCES APPLICABLE TO ALL COMPETENCIES | | | | |
|---|--|--|--|--|
| Job Sharing | | | | <ul style="list-style-type: none"> Employee Development and Training Development Template |
| Buddy System | | | | <ul style="list-style-type: none"> New Employee Orientation |
| Mentoring | | | | <ul style="list-style-type: none"> Coaching for Improved Performance ABOG Mentorship Program Introduction to Coaching Skills for Managers and Leaders - - available through CompassPoint (approx \$185) |
| Trends in HR | | | | <ul style="list-style-type: none"> SHRM Website SHRM Certification Northern California Human Resources Association |

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, Pamela.hayes@ucsf.edu

Please Share your thoughts/suggestions regarding this new development plan process for HR practitioners.