

HR Boot Camp Materials

Staff Recruitment Process Checklist:

Pre-Posting

- Modify or create the Job Description in People Admin
- Create listing in Cornerstone
- Complete and attach a *Request for Authorization to Fill Position* form for approval
<http://hr.okstate.edu/hr/supertools#srchWSuccess>
- Determine Advertising (optional) – if advertising position, attach ad to the Cornerstone job listing

Pre-Interview

- Develop recruitment plan
 - Develop search committee, prepare interview questions
- Screen qualified applicants
 - Does the applicant meet the minimum qualifications?
 - Change applicant statuses in OSU Jobs appropriately
- Select candidates for interview

Interview

- Follow a standardized interview process:
 - Ask the same question of each applicant, ask questions related to job duties and competences, avoid unacceptable inquiries

Pre-Offer Procedures

- Remove listing from career site
- Determine finalists
- Conduct reference checks
- Determine top candidate
- Determine proposed salary offer
 - Is the requested amount within the hiring range?
 - Does the amount require a *Compensation Adjustment Request Form*?
http://hr.okstate.edu/hr/pay_plan
 - If so, route form for approval. Secure approval prior to proceeding with offer
- Submit offer letter in Cornerstone for approval

Offer/Post-Offer Procedures

- Once approvals have been obtained, make the Job Offer
 - Offer contingent upon successful completion of background check
 - Include probationary period if applicable
- If candidate accepts offer, change status of remaining finalist(s)
- Request background check
 - Inform candidate of online authorization email from Truescreen
 - Candidate has 5 days to complete online authorization

Sample Job Description:

Oklahoma State University Position

The Position form is used to record the duties, responsibilities, qualifications sought and fiscal impact of classified and nonclassified positions.

Employee Details	
Employee First Name	Jane
Employee Last Name	Doe
Employee ID Number	10000000

Position Information

Item Number	
Approved Position Title:	Admin Supp Ast
Proposed Class Code/Title:	0328
Department	OSU Department
Campus:	Stillwater
Position Type:	Staff
Exceptional working conditions:	Overtime is an essential function of this position and may require work during nonbusiness hours which include evenings, Saturdays and Sundays.
Please list the job titles and number of employees supervised.	
Proposed Hiring Range:	\$7.25 to \$12.35 hr.
Payroll Type:	Biweekly
REQUIRED:	
Describe any exposure to physical danger and/or environmental hazards:	Majority of work is in a normal office environment. May be required to work outside in all types of inclement weather. Exposed to extreme heat and cold.
Describe any physical requirements: <i>(lifting and repetitive motions)</i>	Ability to lift 25 pounds
Degree:	High School/GED

Field of Study:	
Experience:	
Certifications, Registrations, or Licenses Please list any certifications, registrations, or licenses <u>required</u> as a prerequisite of employment.	Valid driver's license
Skills, Proficiencies and Knowledge Please list the skills, proficiencies and knowledge needed to perform the essential duties of the position. PREFERRED:	Must have working knowledge of Microsoft Word, Excel, Access (data entry, database editing, and report generating) and Adobe Reader and Acrobat. Position also requires the employee to manage multiple routings simultaneously, adapt to change when necessary to refine procedures of efficiency, to work with several different people in differing levels---from staff and faculty to associate deans, and to maneuver around campus daily and in all weather conditions.
Degree:	No Response
Field of Study:	
Experience:	OSU experience (either student or staff), familiarity with campus, and demonstrated website development and/or management using Joomla, Adobe Photoshop, Illustrator, and Fireworks. Five years of general office experience to include experience in design and maintenance of a Joomla CMS website and proficiency in creation and manipulation of graphics in multimedia and design software.
Hiring Official Name:	
Faculty Appointment Length:	No Response
Hiring Official Phone:	
Staff Appointment Length:	Further Notice
Hiring Official Email:	
Search Committee:	
FTE:	1.0
Certifications, Registrations, or Licenses Please list any certifications, registrations, or licenses <u>preferred</u> as a prerequisite of employment.	Completion of the Ambassador Program or comparable program within three years of hire.
Position number:	123456

Skills, Proficiencies and Knowledge Please list the skills, proficiencies and knowledge preferred to perform the essential duties of the position.	
Eligibility for Benefits:	Full Benefits
Advertised Pay Range:	
Please indicate the race, sex, salary and date vacating for the person leaving this position:	
Start date:	
Appointment dates:	
End date:	
Job Summary:	The employee is responsible for answering the main department telephone, greeting visitors to the office and directing faculty, processing mail, performing light office/clerical work for departmental staff, and providing temporary telephone coverage for the Business Office during the lunch hour. The employee assists the department manager with maintaining the master routing database (Microsoft Access) and generating database queries (in Microsoft Excel). The employee also maintains the department website (templates are in Joomla). The main responsibility of the employee is to coordinate the routing (delivering documents for signatures/approvals across campus) of all proposal and acceptance actions for the College. Routing requires the employee to maintain a paper tracking system, be able to start and stop auxiliary work to deliver progress routings through the approval process, deliver paperwork from one campus location to another daily and in all weather conditions, and to interact with administrative staff in 24 departments.
Department address:	College Address
Immediate Supervisor:	Name
Supervisor's Telephone Number:	405-744-5000
Supervisor's Title:	Dean
Compensation Analyst:	
Position Number of Supervisor:	10000
Background Check Type:	Criminal History Records Check

If Other, please specify:	
Departmental users with permission to access position information (include all departmental HMs and contacts accessing this position)	
Department Preferences:	
Justification:	Update position to reflect new responsibilities of position
Starting Pay	
I hereby certify that the recruitment effort followed University Equal Employment Opportunity/Affirmative Action Policy. Race, color, creed, sex, national origin, veteran status, or disability was not considered among the factors which led to the choice of the person selected to fill position. Records of all recruiting efforts (Applications, personal contracts, publicity, and telephone call records) will be kept for three years. Additionally, I affirm that adequate reference checks have been conducted regarding the professional qualifications and credentials of the applicant.	Certify

Major Responsibilities

Percent of Duty Total: **100**

4 Records

% of Time	Responsibility / Duty
60	The employee maintains a paper tracking system of routing sheets and a master calendar of routing due dates in order to process routings to request/accept external funding through university approval (typical routings require up to six signatures). The employee assists the Manager and Proposal Development Specialist and each of the Budget Office's Grants and Contracts Specialists. The employee is required to deliver each routing around campus and to any of the 24 departments within the College, other colleges that comprise OSU, and OSU administration. The position requires a lot of deliveries in all types of weather conditions.
15	The employee will be responsible for the design implementation and updates to the department website templates in Joomla. Updates and additions are made monthly to the Joomla CMS website. Employee will need to be able to manipulate graphics in multimedia and design software, including Adobe Photoshop, Illustrator, and Fireworks. The overall structural development, security, and management of the web domain is handled by the college IT department.
15	The employee assists the Manager with the management of the routing database (MS Access). The employee may be called upon by the Associate Dean or Manager to run database queries and develop reports in MS Excel on a quarterly or annual basis. The employee will also assist the Manager in reconciling the quarterly routing reports that are

generated by the OSU Office of University Research Services (OURS). The employee will also assist the Manager with reconciling the monthly college Institutional Research Board (IRB) application tracking log.

10 The employee will be required to perform general office duties such as greeting visitors and faculty from the front desk, answering the main telephone line for RSS, processing mail and handling overnight mail needs, ordering and/or coordinating the ordering of office supplies for RSS staff, assisting with the telephone coverage of the Business Office during the lunch hour and as needed on occasion, and keeping the office and conference rooms presentable.

Working Conditions

No Records Found

Additional Responsibilities

1 Record

Description

TEAMWORK: Promotes a positive work environment by behaving and communicating in a manner that is respectful of others. Encourages cooperation, collaboration, and co-ownership of success. Communicates honestly and openly, listens attentively, and assumes responsibility for resolving difficulties appropriately. Supports diversity in establishing relationships in which all individuals are valued, appreciated and included.

PROFESSIONALISM: Exhibits a courteous, conscientious and businesslike manner in the workplace. Actively endorses and supports OSU's mission and works for fulfillment of vision and goals while acknowledging the contribution of ethical and scholarly questioning in an environment that respects the rights of all to freely pursue knowledge. Seeks excellence in all endeavors and is committed to continuous improvement. Seeks knowledge that will provide skills that enable improved job performance.

SERVICE: Contributes to the success of others by responding to others in a courteous, timely and accurate manner, seeking assistance when necessary to create a positive OSU experience that exceeds the expectations of students, and internal and external contacts. Understands performance directly affects the future of OSU and strives to perform to enhance the OSU experience. Remains positive when changes are made to procedures, environment or responsibilities.

STEWARDSHIP: Accepts responsibility for the public's trust and is accountable for individual actions. Demonstrates efficient and effective use of time, equipment and other resources. Maintains confidences and protects security of operations by keeping information confidential and equipment/facilities secure. Works in a safe manner using safety equipment and procedures as appropriate and encourages others to do the same.

Add the following supervisory description if the position will supervise two full-time employees:

SUPERVISORY: Provides leadership, guidance and direction to employees. Selects qualified workers and ensures proper training and guidance on policies and procedures. Gives positive reinforcement in a timely manner for job success and provides accountability for poor behaviors and performance. Communicates information regarding OSU's mission, vision and goals so that employees may increase their contribution to the organization's success.

Sample Job Listing:

Job Summary	
Position Type:	Staff
Approved Position Title:	Administrative Support Assistant
Position Number	123456
Campus:	Stillwater
City:	Stillwater
Department	OSU Department
Hiring Range:	\$7.25-\$12.35/hr. (contingent upon available funding)
Work Schedule:	Monday - Friday 8:00am to 5:00pm Overtime is an essential function of this position and may require work during nonbusiness hours which include evenings, Saturdays and Sundays.
Listing date:	09-22-2014
Closing Date:	Open Until Filled
Job Summary:	<p>The employee is responsible for answering the main department telephone, greeting visitors to the office and directing faculty, processing mail, performing light office/clerical work for departmental staff, and providing temporary telephone coverage for the Business Office during the lunch hour. The employee assists the department manager with maintaining the master routing database (Microsoft Access) and generating database queries (in Microsoft Excel). The employee also maintains the department website (templates are in Joomla). The main responsibility of the employee is to coordinate the routing (delivering of documents for signatures/approvals) of all proposal and acceptance actions for the College. Routing requires the employee to maintain a paper tracking system, be able to start and stop auxiliary work to deliver progress routings through the approval process, deliver paperwork from one campus location to another daily and in all weather conditions, and to interact with administrative staff in 24 departments.</p>
Special Instructions to Applicants	<p>For maximum consideration, deadline for receipt of application material is October 29th. However, the position will remain open until filled.</p> <p>Must have a current typing test on file with OSU Human Resources.</p>

Background Check Type:	Criminal History Records Check
If Other, please specify:	
Requisition/Listing Number	09123

Education and Experience

Required	
Field of Study:	
Location:	OSU/Stillwater
Degree	High School/GED
Experience:	Must have working knowledge of Microsoft Word, Excel, Access (data entry, database editing, and report generating) and Adobe Reader and Acrobat. Position also requires the employee to manage multiple routings simultaneously, adapt to change when necessary to refine procedures of efficiency, to work with several different people in differing levels---from staff and faculty to associate deans, and to maneuver around campus daily and in all weather conditions.
Certifications, Registrations, or Licenses	Completion of Ambassador Program within 3 years.
Skills, Proficiencies and Knowledge	
Preferred	
Field of Study:	
Degree:	High School/GED
Experience:	OSU experience (either student or staff), familiarity with campus, and demonstrated website development and/or management using Joomla, Adobe Photoshop, Illustrator, and Fireworks. Five years of general office experience to include experience in design and maintenance of a Joomla CMS website and proficiency in creation and manipulation of graphics in multimedia and design software.
Certifications, Registrations, or Licenses	
Skills, Proficiencies and Knowledge	

Staff are available to assist with accommodation requests and assistance. For assistance, please call 405-744-7401 or email at osu-hr@okstate.edu.

For in-person assistance, please visit Human Resources at 106 Whitehurst.

Oklahoma State University is an Affirmative Action/Equal Opportunity/E-verify employer committed to diversity. All qualified applicants will receive consideration for employment and will not be discriminated against based on race, color,

religion, sex, national origin, disability or protected veteran status. OSU-Stillwater is a tobacco-free campus. For more information go to www.affirmact.okstate.edu.

Sample Job Advertisement:



Oklahoma State University-Stillwater, OK

Oklahoma State University Physical Plant Services is excited to announce the opening of the following full-time Electrician positions. If you are interested in working on a University campus, please apply. Applicants must apply online to jobs.okstate.edu. Refer to the appropriate job listing number when making application.

Listing number: 07643 Electrician I

Listing number: 07594 Electrician II

Listing number: 07517 Electrician III

Oklahoma State University is an Affirmative Action/Equal Opportunity/E-verify employer committed to diversity and all qualified applicants will receive consideration for employment and will not be discriminated against based on race, color, religion, sex, national origin, disability or protected veteran status. OSU is a VEVRAA Federal Contractor and desires priority referrals of protected veterans for its openings. OSU-Stillwater is a tobacco-free campus.

Sample Behavioral Interview Questions:

- Describe a time when you have been able to overcome an obstacle in a creative manner?
- Tell me about a time in which you were able to persuade others to adopt your idea.
- Tell me about an accomplishment you had a difficult time achieving.
- Give me an example of a time when you were asked to complete a task but were not given enough information to get it done.

Additional sample interview questions are available at <http://hr.okstate.edu/>. Click on Supervisor Toolkit and more information can be found under *Search with Success*.

Career Development Plan:

Computer Specialist

Technical Professional Services Specialist/Supervisor (3152/3151)

Career Development Plan

This Career Development Plan provides promotional opportunities for Computer Specialists at Oklahoma State University who continually demonstrate meritorious performance. Progression within the plan signifies an increase in skills, competencies and contributions to the organization's goals and objectives. The increased contribution is above and beyond normal changes that are necessary to maintain satisfactory performance within an ever-changing business environment. While this plan offers promotional opportunities, it does not require career advancement. Neither does it preclude appropriate action for those who fail to meet a satisfactory standard of performance.

Position: Computer Specialist I

Duties:

- Performs job functions under supervision
- Performs special projects or tasks under supervision

Minimum Qualifications:

- Bachelor's degree and one year of related experience OR
- High school and six years related experience with requirement to receive bachelor's degree within six years of hire
- Excellent communication and interpersonal skills

Preferred Qualifications:

- As determined by department

Hiring Range:

- \$2,810 - \$3,370/month; \$33,720 - \$40,440/annual

Development Requirement to Computer Specialist II:

- Departmental need and budgetary capability
- Meet Computer Specialist II minimum qualifications
- Demonstrated knowledge of University computer usage principles and procedures
- "Merit" performance within current position as documented by performance evaluation
- Minimum of two years of experience as Computer Specialist I

Development Increase to Computer Specialist II

- Up to 10% above current salary
- Proposed monthly wage would be no less than \$3,090/month

Position: Computer Specialist II

Duties:

- Performs job function under minimal supervision
- Performs complex special projects or tasks
- Operates and masters multiple software applications and operating systems

Minimum Qualifications:

- Bachelor's degree and three years of related experience OR
- High school and eight years related experience and demonstrated progress toward bachelor's degree
- Working knowledge of setting up and maintaining computer systems and servers including configuration
- Excellent communication and interpersonal skills

Preferred Qualifications:

- As determined by department

Hiring Range:

- \$3,090 - \$3,710/month; \$37,080 - \$44,520/annual

Development Requirement to Computer Specialist III:

- Departmental need and budgetary capability
- Meet Computer Specialist III minimum qualifications
- “Merit” performance within current position as documented by performance evaluation

Developmental Increase to Computer Specialist III

- 10% increase above current salary
- Proposed monthly wage would be no less than \$3,395/month

Position: Computer Specialist III

Duties:

- Leads complex projects, tasks, or work groups
- Provides training for other faculty, staff, and student assistants

Minimum Qualifications:

- Bachelor’s degree and five years of related experience OR
- High school and ten years related experience and demonstrated progress toward bachelor’s degree
- Detailed knowledge of setting up and maintaining computer systems and servers including configuration
- Demonstrated leadership experience
- Excellent communication and interpersonal skills

Preferred Qualifications:

- As determined by department

Hiring Range:

- \$3,395 - \$4,080/month; \$40,740 - \$48,960/annual

Development Requirement to Sr. Computer Specialist I:

- Departmental need and budgetary capability
- Meet Sr. Computer Specialist I minimum qualifications
- “Merit” performance within current position as documented by performance evaluation

Development Increase to Sr. Computer Specialist I:

- 10% increase above current salary
- Proposed monthly wage would be no less than \$3,735/month

Position: Sr. Computer Specialist I

Duties:

- Supervises/mentors and trains Computer Support Specialists
- Detailed knowledge of setting up and maintaining computer systems and servers including configuration
- Participates in advanced decision-making
- Researches, designs and implements new technology solutions

Minimum Qualifications:

- Bachelor’s degree and seven years of related experience
- Demonstrated leadership skills
- Excellent communication and interpersonal skills

Preferred Qualifications:

- As determined by department

Hiring Range:

\$3,735 - \$4,490/month; \$44,820 - \$53,880/annual

Development Requirement to Sr. Computer Specialist II:

- Departmental need and budgetary capability
- Meet Sr. Computer Specialist II minimum qualifications
- “Merit” performance within current position as documented by performance evaluation

Development Increase to Sr. Computer Specialist II:

- 10% above current salary
- Proposed monthly wage would be no less than \$4,110/month

Position: Sr. Computer Specialist II

Duties:

- Participates in long-range and short-range planning
- Anticipates departmental needs and solves problems

Minimum Qualifications:

- Bachelor's degree plus 10 years related experience or master's degree and 8 years related experience
- Demonstrated leadership skills
- Excellent communication and interpersonal skills

Preferred Qualifications:

- As determined by department

Hiring Range:

\$4,110 - \$4,940/month; \$49,320 - \$59,280/annual

Additional promotional opportunities involving pay increases would be in accordance with Pay Guidelines and require approval by the Vice President.

Oklahoma State University is a dynamic and ever-changing organization. Therefore, it is expected that any and all provisions of this plan may change. OSU reserves the right to modify, revoke, suspend, terminate or change any or all provisions of the plan, in whole or part, at any time, with or without notice. The language that appears in this document is not intended to create, nor is it to be construed to constitute, a contract between Oklahoma State University and any or all of its employees.



ACHIEVING GREATNESS

Staff Performance Review

Employee: Ima Employee

Title: Administrative Support Assistant

Staff ID #: 00000000

Date: April 2014

Department: OSU Department

Performance Review Period: Annual

Staff member was at least competent in all performance factors and key responsibilities during this period:

RATING _____ YES _____ PARTIAL _____ NO _____

Not Meeting Expectations

Competent

Commendable

SIGNATURES:

I acknowledge that I have seen and discussed the attached review with my supervisor. I understand that I may make a written statement on this form now or within ten working days. If a statement is submitted within ten days, it will be attached to this report.

Employee: _____ Date: _____

Supervisor: _____ Date: _____

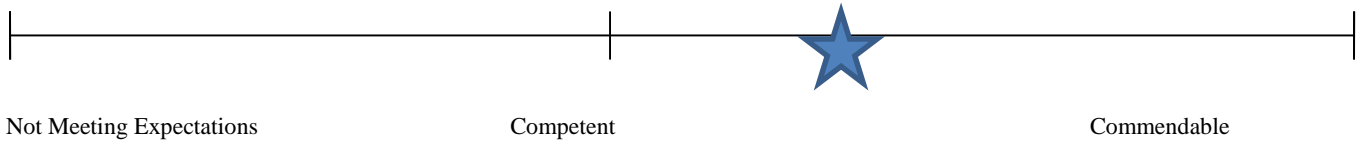
Date of Supervisor's last appraisal training: _____

Supervisor or Dept. Head: _____ Date: _____

Note: Employee must receive a signed copy of this evaluation within 30 days or upon request. The staff member's signature certifies that he/she has seen the overall review being submitted to the personnel record.

SECTION 1: PERFORMANCE FACTORS

TEAMWORK – Promotes a positive work environment by behaving and communicating in a manner that is respectful of others. Encourages cooperation, collaboration, and co-ownership of success. Communicates honestly and openly, listens attentively, and assumes responsibility for resolving difficulties appropriately. Supports diversity in establishing relationships in which all individuals are valued, appreciated and included.



EMPLOYEE REVIEW:

Ways in which I met this expectation:

I helped Sarah get to know others and trained her on her job when she was hired into our department. I've contributed to a number of projects my co-workers are working on, specifically, the computer updates were completed two weeks ahead of schedule.

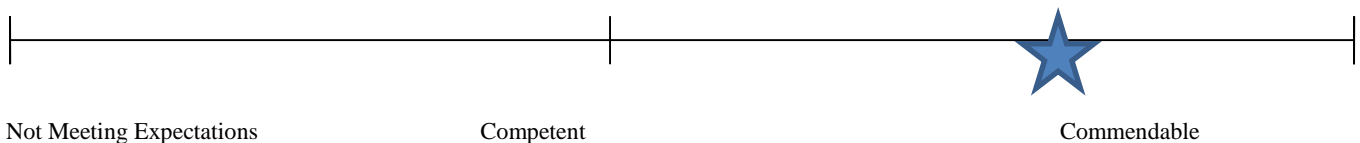
Ways in which I will continue to improve and grow in this area:

Teamwork is a core principle for our department and one which I am working hard to fulfill. I will continue to help co-workers complete projects to ensure deadlines are met.

SUPERVISOR COMMENTS:

Ima is supportive of coworkers and understands how her talents and the talents of others can be best utilized to accomplish goals. I was impressed with the ahead of schedule completion of the computer updates that Ima was in charge of completing.

PROFESSIONALISM – Exhibits a courteous, conscientious and businesslike manner in the workplace. Actively endorses and supports OSU's mission and works for fulfillment of vision and goals while acknowledging the contribution of ethical and scholarly questioning in an environment that respects the rights of all to freely pursue knowledge. Seeks excellence in all endeavors and is committed to continuous improvement. Seeks knowledge that will provide skills that enable improved job performance.



EMPLOYEE REVIEW:

Ways in which I met this expectation:

I always pay extra close attention to how I conduct myself even during challenging times. I am calm and composed under high pressure.

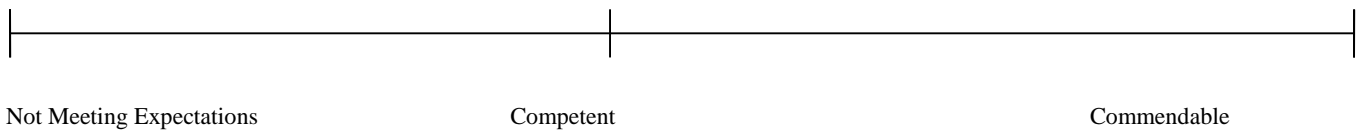
Ways in which I will continue to improve and grow in this area:

I am very strong in my professionalism abilities but I realize there are always more things to learn to increase my skill knowledge. I will continue to pursue areas of improvement through additional training and development.

SUPERVISOR COMMENTS:

Ima is always enthusiastic, energetic and displays a positive behavior. I encourage Ima to continue displaying her professionalism.

SERVICE – Contributes to the success of others by responding to others in a courteous, timely and accurate manner, seeking assistance when necessary to create a positive OSU experience that exceeds the expectations of students, and internal and external contacts. Understands performance directly affects the future of OSU and strives to perform to enhance the OSU experience. Remains positive when changes are made to procedures, environment or responsibilities.



EMPLOYEE REVIEW:

Ways in which I met this expectation:

You can rely on me to get the information you need. I value my time with customers and always strive to exceed their expectations.

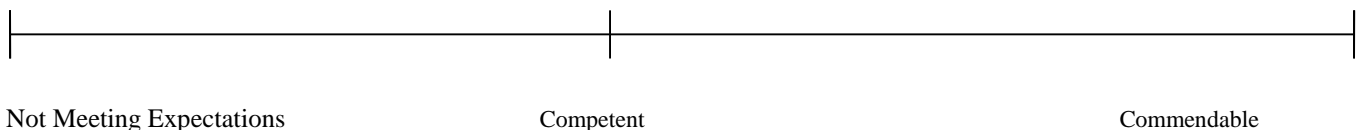
Ways in which I will continue to improve and grow in this area:

I want to improve my communications skills for those tough times when I have to deliver news that a customer does not want to hear.

SUPERVISOR COMMENTS:

Ima will always follow through and finds the answers to any questions. She is also great at reporting back information to students, coworkers and other customers she has interaction with on a daily basis.

STEWARDSHIP – Accepts responsibility for the public’s trust and is accountable for individual actions. Demonstrates efficient and effective use of time, equipment and other resources. Maintains confidences and protects security of operations by keeping information confidential and equipment/facilities secure. Works in a safe manner using safety equipment and procedures as appropriate and encourages others to do the same.



EMPLOYEE REVIEW:

Ways in which I met this expectation:

In our department we had several items in supply that we rarely used. I thought there might be a way to limit the amount of unused items so I created a procedure for employees to check in and check out inventory. This way we are sharing resources instead of purchasing our own rarely used supply.

Ways in which I will continue to improve and grow in this area:

I will continue to seek ways of utilizing our resources efficiently and will revise or create procedures to ensure we are being good stewards of our resources.

SUPERVISOR COMMENTS:

Ima provides good stewardship of the University’s existing resources and identifies opportunities for more efficient operations such as when she implemented procedures for purchasing supplies to reduce the inventory of unused items.

SECTION 2: KEY PERFORMANCE RESPONSIBILITIES

RESPONSIBILITY 1 – SUPERVISOR RESPONSIBILITY

Provides leadership, guidance and direction to employees. Selects qualified workers and ensures proper training and guidance on policies and procedures. Gives positive reinforcement in a timely manner for job success and provides accountability for poor behaviors and performance. Communicates information regarding OSU’s mission, vision and goals so that employees may increase their contribution to the organization’s success.



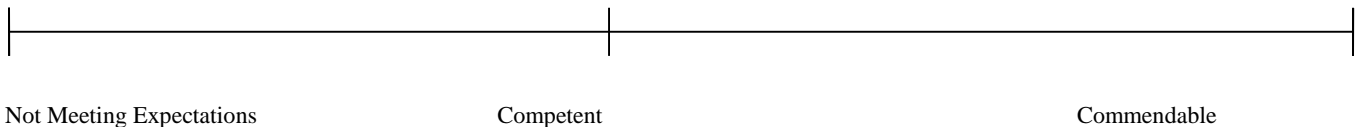
EMPLOYEE REVIEW:

Ways in which I met this expectation:

Ways in which I will continue to improve and grow in this area:

SUPERVISOR COMMENTS:

RESPONSIBILITY 2 –



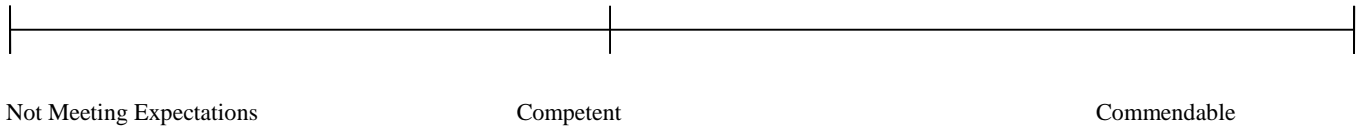
EMPLOYEE REVIEW:

Ways in which I met this expectation:

Ways in which I will continue to improve and grow in this area:

SUPERVISOR COMMENTS:

RESPONSIBILITY 3 –



EMPLOYEE REVIEW:

Ways in which I met this expectation:

Ways in which I will continue to improve and grow in this area:

SUPERVISOR COMMENTS:

RESPONSIBILITY 4 –



EMPLOYEE REVIEW:

Ways in which I met this expectation:

Ways in which I will continue to improve and grow in this area:

SUPERVISOR COMMENTS:

Sample Performance Improvement Plan (PIP):

Date: DATE

To: EMPLOYEE

From: SUPERVISOR

Re: Performance Improvement Plan

As discussed, there are several areas of your performance which require your immediate attention. Therefore, you are being placed upon a performance improvement plan for up to **90** days. This probationary period will begin on **DATE** and end no later than **DATE**. During this time we will meet to formally review your progress and provide training as warranted.

INSERT DETAILS REGARDING PERFORMANCE LAPSES.

INSERT PERFORMANCE EXPECTATIONS.

If you are unable to meet these performance expectations, further disciplinary action will be taken, up to and including termination of your employment.

During your employment in **DEPARTMENT**, you have gained valuable knowledge about the processes at Oklahoma State University and we are hopeful that the current situation can be corrected. In an effort to assist you in accomplishing these goals I will periodically meet with you to discuss your progress. Our first meeting will be **TIME, DATE**.

If you feel you have not been provided adequate training or if there are questions regarding your position, or your performance improvement plan please ask me.

Signature (signifies receipt of PIP)/Date

Witness/Date

C: Administrative Officer
Human Resources

Discussion Worksheet

Pre-Meeting Checklist

Name of Employee: Ima Employee Date: 8/28/2014

Supervisor: Ima Supervisor

Types of Problem: Attendance Performance Behavior / Conduct

Dates of any previous discussions about the problem: no previous discussion held

Basic Issue / Overall Concern: Late to work

Desired Performance: Arrive on time at 8 a.m.

Actual Performance: At 8:15 a.m. I went by Ima's desk and she was not there

Impact: (The good business reasons why the problem must be solved) Business hours are from 8-5 p.m. and if customers call, I need Ima available to answer the phone

Consequences: (the logical consequences the individual will face if he / she fails to correct the situation)
First step corrective action

The Five Classic Questions:

- Did the employee clearly understand the rule or policy that was violated?
- Did the employee know in advance that such conflict would be subject to disciplinary action?
- Was the rule violated reasonably related to the safe, efficient and orderly operation of the business?
- Is there substantial evidence that the employee actually did violate the rule?
- Is the action planned reasonably related to the seriousness of the offense, the employee's record with the organization, and to action taken with the employees who have committed a similar offense?

Action (This discussion is intended to be):

Performance Improvement Discussion Formal Disciplinary Action Informal Discussion

Discussion Worksheet

Post-Meeting Summary

Employee Name: Ima Employee

Discussion Date: 8/28/2014

Gaining Agreement: Did the employee agree to solve the problem / correct the situation Yes No

Notification: Was the employee advised of the specific action taken (Performance Improvement Discussion or formal disciplinary action)? Yes No

Employee Assistance Program: Was the employee provided information / referral to the EAP? Yes No

Summary of discussion: I let Ima know I went by her desk at 8:15 a.m. and noticed she had not arrived yet. She said she was on her way to work and realized her son had forgotten his lunch so she had to drop the lunch off at his school.

Employee's solution (Action the employee will take to correct the situation): She will be here on time and she will try to leave the house earlier to give herself more time to get to work.

Other solutions (Action to be taken by yourself or other people to help the employee solve the problem):
None

Employee's reaction: (Summary of employee's comments about the situation or the discussion):

Ima agreed she would get to work on time.

Completed by: Ima Supervisor

Follow-up date: 9/28/2014

CORRECTIVE ACTION DISCUSSION SCENARIOS

Informal Discussion

Supervisor: Ima, do you have a second? This morning at 8:15, I came by your desk to ask you a question and I was told that you had not arrived for work yet. (wait for response)

Employee: I got almost to work and realized that Tommy left his lunch in the car. I had to go back to school and drop it off.

Supervisor: I understand that mornings can be a challenge, but it is important that you be at work at 8:00 or your tardiness disadvantages all of us, and especially individuals that may be calling our office for information.

Employee: I know getting to work on time has been a problem lately. I'll try harder.

Supervisor: I know you have good intentions, but trying does not always ensure results. I need to know that you will be here on time. If we continue to have this problem, it could lead to more serious corrective action.

Employee: I will be here on time.

Supervisor: Thank you, I appreciate that you understand the importance of your attendance and will report to work on time going forward.

First Formal Reminder Scenario

Supervisor: Ima, I have a problem and need your help.

Employee: A problem?

Supervisor: When we reorganized a few months ago, we discussed the need for all of us to work together. I don't see you acting like a real team player.

Employee: What do you mean?

Supervisor: Yesterday, when we needed to get that big mailing out, you didn't pitch in to help. When Sam asked you, I overheard you say it wasn't part of your job. And last week during the team meeting, you still didn't contribute even though we discussed the value of your doing so before the meeting.

Employee: Well, I guess I can do that.

Supervisor: What do you mean?

Employee: I will volunteer to assist others more and I will speak up in meetings.

Supervisor: Thanks. Ima, this is serious. Since it is not the first time we have discussed teamwork, I will be making a note in your file that this is a verbal reminder. If we have no further discussions in the next 3 months, I will remove it.

Employee: I understand. I will be a team player in the future.

Supervisor: Thanks. That's great. Can we consider this case closed?

Second Formal Reminder Scenario

Supervisor: Ima, thanks for coming. There is something bothering me that we need to discuss. In January we discussed the need to have forms processed within 36 hours. Do you remember our discussion?

Employee: Yes.

Supervisor: At that time we discussed how important timeliness was for the entire system. If we don't code information into the system promptly, it slows up all subsequent actions. You agreed at that time that you would meet the required 36 hour deadline. I was surprised to learn yesterday that you are not meeting the deadline. Last week forms which we received on Monday were not processed until Thursday. Other staff pitched in and spent Friday getting you caught up and yet this week we have the same problem. By Wednesday at close of business, I understand we still had forms from Monday.

Employee: That is not good is it?

Supervisor: No, it's not good. When we spoke in January, I told you that that discussion was considered your first formal reminder and it would be documented in your file. You agreed that you understood the importance and that processing would be timely.

Employee: I know it is important but there are always interruptions.

Supervisor: Ima, processing forms is the priority of your position. In the past, we discussed how to handle interruptions so they do not interfere with processing. Let's be clear about this, it is your responsibility to process forms within 36 hours. What are you going to do to ensure that you meet this requirement?

Employee: I guess I'll try harder.

Supervisor: Ima, I need more than that. How are you going to try harder?

Employee: I am going to prioritize my work. I will do all processing first thing in the morning before I start other work.

Supervisor: Will that solve the problem?

Employee: Yes, I will get all the processing done in time and we won't have to talk about this again.

Supervisor: I will be documenting what we have talked about today, along with your agreement to process work orders timely. It will remain active in your file for six months. If there are no further problems, in six months it will be taken out of your file.

Next morning: Ima and the supervisor meet.

Supervisor: Ima, as we discussed yesterday, I have summarized our conversation for the file and I want to give you a copy of the memo. This is documentation of our discussion as a formal written reminder. If you have any questions, please let me know.

Decision Making Assignment Scenario

Supervisor: Ima, when we had both oral and written reminder conversations, you agreed that you would solve the problem and perform your job in an acceptable manner. This hasn't happened yet. This morning the same problem came up again.

Employee: Yeah, well, I tried but sometimes things happen.

Supervisor: Ima, you have to make a decision now about whether this is really the right job for you.

Employee: Of course it is. You know I really like it here.

Supervisor: I am glad to hear you say that, Ima, but the problem keeps coming up. You really must make a serious decision about whether you can, in fact, solve this problem and meet all of the job requirements and follow policy. That's why at the end of the meeting, you will be placed on decision making assignment.

Employee: You mean I am fired!

Supervisor: No, you are not being fired; you are being placed on decision making leave, the final step in our corrective action procedure. You are being given the opportunity to decide if this is the right position for you. I want you to seriously think the situation over and decide whether this is the right job for you and whether you can solve the problem and perform every part of your job at a fully acceptable level.

Employee: I don't need off tomorrow. I know I can do the job.

Supervisor: Ima, we are past the point of making quick commitments that you do not perform up to. That is why we are giving you tomorrow off. I want you to use your time tomorrow to decide if you are going to solve the problem forever and make a commitment to fully acceptable performance in every area of your job, or decide to resign and find a job that is a better fit for you.

Employee: But this job is fine for me, I am a great fit.

Supervisor: It isn't enough to want to keep your job. Let me be really clear on exactly what I am asking you to do. Ima, you have a decision to make. You can decide that you will also commit to doing your job so that there will never be any further problems, either this one or any other. Or you can decide to resign. Is this clear?

Employee: So you want me to promise to do my job and do it right?

Supervisor: Ima, you made that commitment before but did not follow through. Now, it requires more than that. When you come back tomorrow, you will meet with me and let me know what you have decided. You have to make the decision. If you want to keep your job, what I need is total commitment to good performance in every part of your job. If another problem comes up, this one or any other, I will recommend that you be dismissed.

Employee: That is not fair! You can't expect me to agree to do every part of my job perfectly. I'm not perfect! Nobody's perfect! You are just setting a trap to fire me.

Supervisor: I am not asking you to be perfect. But I am telling you that we are at the last step of our corrective action process. If you want to continue working here you have to perform in a totally acceptable way. You must understand that if any other problem that requires corrective action arises, you can expect to be terminated. But I believe that if you think about it tomorrow and decide that this in fact the job for you and make a genuine change, you will be able to live up to it. I will meet with you first thing the day after tomorrow to learn of your final decision.

Reference Sheet

Recruitment:

- New Employee Paperwork <http://hr.okstate.edu/hr/new-hire-info>
- Benefits comparison chart:
<http://hr.okstate.edu/sites/default/files/docfiles/OSU%202014%20Benefit%20Plan%20Comparison%20100313.pdf>
- Search for Success: <http://hr.okstate.edu/hr/supertools#srchWSuccess>
 - Cornerstone User Guides
 - Employee Authorization for Reference Release
 - Sample Interview Questions
 - Employment Checking Procedures:
<http://hr.okstate.edu/sites/default/files/docfiles/EmploymentChecks.pdf>

Staff Pay Plan:

- Staff Pay Plan: http://hr.okstate.edu/hr/pay_plan
 - Classification Chart
 - Annual Staff Report
 - Training Incentive Programs
- OSU Pay Plan FAQs: [http://hr.okstate.edu/sites/default/files/docfiles/OSU Staff Pay Plan FAQ.pdf](http://hr.okstate.edu/sites/default/files/docfiles/OSU%20Staff%20Pay%20Plan%20FAQ.pdf)

Maximizing Performance (Performance Review & Corrective Action):

<http://hr.okstate.edu/hr/supertools#maxPerf>

- Pre Meeting and Post Meeting Worksheets
- Performance Review Guidelines

Policies & Procedures: http://hr.okstate.edu/policy_proced

- Types of Available Leave: <http://hr.okstate.edu/sites/default/files/docfiles/leavetypes.pdf>
- Holiday Schedule: <http://hr.okstate.edu/holidaysch>
- Employee injury report: <https://hr.okstate.edu/sites/default/files/docfiles/WCEmployeeInjuryReport.pdf>
- FMLA: <http://hr.okstate.edu/family-medical-leave-act>

Other Helpful Websites:

- Cornerstone Talent Management System: <http://talent.okstate.edu>
- OSU Directory: directory.okstate.edu
- OSU Training Calendar: <http://talent.okstate.edu>
- Supervisor Toolkit: <http://hr.okstate.edu/hr/supertools>
- Web for Employees: <http://webemp.okstate.edu/>

HR Related Policies and Procedures

http://hr.okstate.edu/policy_proced

General University

Number Policy Title

1-0101	Equal Opportunity/Affirmative Action
1-0131	Use of Electronic Mail
1-0401	Employment of Athletic Department Administrators and Intercollegiate Coaches
1-0530	Tobacco Use in University Buildings and Grounds
1-0604	Audits Which Uncover Criminal Acts
1-0702	Gender Discrimination and Sexual Harassment Policy and Title IX Grievance Procedure
1-0705	Political Activities of Employees
1-0803	Employment of Internationals
1-1201	Appointment of Interim or Acting Administrators
1-1204	Professional Development/Retreats
1-1205	Drug-Free Workplace
1-1301	Weapons, Firearms, Ammunition, Fireworks, Explosives, and Dangerous Chemicals

Administration and Finance

Number Policy Title

3-0203	Clothing and/or Uniforms Provided to Employees
3-0256	Employee Incentive Awards
3-0320	Payroll
3-0321	Monthly Time and Effort Confirmation
3-0322	Electronic Use of Social Security Numbers
3-0362	Reporting and Taxability of Assistantships, Fellowships, Scholarships Fee Waivers and Other Payments to Students
3-0420	Purchase of Food and Non-Alcoholic Beverages on Sponsored Project Funding
3-0522	Bomb Threats
3-0523	Campus Threats and Violence
3-0535	Hazard Communication Program
3-0706	Employment, Promotion and Transfer for Classified Staff
3-0708	Family and Medical Leave Act
3-0709	University Holidays
3-0710	Resignations for Classified Staff
3-0711	Layoff and Reduction in Work Force for Staff
3-0712	Human Resource Information Management Systems
3-0713	Attendance & Leave for Staff
3-0714	Staff Training and Development
3-0716	Sick Leave For Staff
3-0719	Military Leave
3-0720	Corrective Actions and Dismissals for Staff
3-0721	Definition, Exemption and Amendments for A/P Staff
3-0726	Employment, Resignation, Suspensions, and Dismissals for A/P Staff
3-0732	Procedures to Govern Compensated Outside Activities of Administrative and Professional Staff Members
3-0740	Uniform Position Classification and Pay Plan for A/P Staff and Classified Staff

- 3-0741 Performance Evaluation Program for Staff
- 3-0742 Timekeeping and Overtime
- 3-0744 University Enrollment for Staff
- 3-0745 Nondiscrimination, Equal Opportunity and Affirmative Action for A/P and Classified Staff
- 3-0746 Grievances and Complaints for Staff
- 3-0750 Long-Term Disability (*Under review*)
- 3-0770 Workers' Compensation Insurance
- 3-0826 Fire Protection and Safety
- 3-0837 Hazardous Materials: Training Hazmat Employees