August 28, 2022

MEMORANDUM

TO: M. Katherine Banks, Ph.D.
              President

FROM: Damon Slaydon
              Working Group Chair

SUBJECT: Implementation Memo – Working Group # 34

Recommendation to be Implemented:
Invest in succession planning and talent management

Strategic Considerations:
This implementation strategy addresses the urgency to create a uniform program that applies to all employees ensuring that the leaders of the future can be identified, developed and retained in order to elevate Texas A&M University to preeminence and sustain the leadership and talent required to maintain continuity and distinction. This program includes both staff and faculty specific aspects and is referred to as the ***Texas A&M University Employee Thriving Plan***.

In alignment with Texas A&M's Mission, Vision, Purpose, and Core Values, this thriving and talent management plan includes identifying talent and critical roles, creating career and leadership paths to foster a thriving mindset and enhance the thriving skill set, and designing the thriving plan protocol for the retention of employees at Texas A&M University.

To establish a robust talent development and management protocol for employees that leverages existing resources and cultivates high performing employees by:
•   Identifying effective talent management practices
•   Promoting growth and development of all employees
•   Developing equitable career development paths to gain professional expertise and/or formal leadership positions
•   Preventing employees from being overlooked for advancement opportunities
•   Building organizational capacity at all levels

Logistical Issues Addressed:

Creating Career and Leadership Paths:
•   Career paths should support the progressive development of core competencies for the different critical roles across the university. Core competencies for career paths should be established within a competency map which identifies the learning objectives and learning activities included in the career development programs. Not all university employees desire supervisory duties or a leadership role. Thus, the thriving plan affords employees the opportunity to develop expertise within their profession. In addition to focusing on staff specific paths typically focused on technical proficiency, faculty career paths should include but are not limited to postdoctoral, Academic Professional Track, Tenure Track and lateral paths that provide growth opportunities through varied experiences for all tracks.

- Leadership paths will leverage a progressive, competency-based leadership development model framed around 4 levels: Leading Self, Leading Others, Leading the Function and Leading the Organization. Further, recognizing the unique conditions for faculty members who have assumed administrative roles, the Division of Faculty Affairs sponsors additional, supplemental leadership development programs: Academic Leader Learning Community, Department Head Development Series, ADVANCE Administrative Fellows, and Faculty Success Fellows

Designing Thriving Plan Protocol: Expectations regarding appropriate competency level as well as career and leadership development program participation should be established at key intervals for each position level indicated (entry-level, mid-level and executive-level). The expectations established at each proposed interval act as a set of general guideline which should be applied with an element of reasonableness.

Career Ladders: Positions within the career ladders should have job descriptions which reflect the core competencies needed and list internal career and leadership development programs and experiences as preferred. Supervisory duties should not be the only driving factor to advance through a career ladder. Upper-level positions (e.g., level III, IV, V or Lead, Senior) within a career ladder should emphasize experience, expertise, mentoring, and coaching.

Performance Management: While our current performance review process creates a foundation for on-going performance discussions and assessment, changes will need to be made to the performance evaluation tool as well as to the annual process. The performance evaluation tool should be modified to allow for all employees to be assessed on the Texas A&M core values as well as core competencies relevant to their position. Good practice states that performance discussions should be conducted on a quarterly basis.

Rules and Practices: Existing Rules, SAPs, and practices should be reviewed to ensure they provide the structure needed for the thriving and talent management plan to succeed. At minimum, the following items should be reviewed and modified, if needed. Employee Tuition Assistance, Merit Salary Increase, Educational Release Time, Job-Related Skill Enhancement Pay, Temporary Salary Increase, Allocation of Professional Development Funds.

Mentoring and Coaching: To support advancement through the upper-levels of career paths and to enrich leadership development programs, formal mentoring and coaching programs should be developed to support good practice. Additionally, employees should be provided the opportunity to seek mentoring and coaching relationships outside of the university.

Equity: A mechanism will be necessary to account for personality conflicts and style differences. Competency verification methods should allow employees the opportunity to be evaluated by individuals (e.g., peers and customers) other than their manager/supervisor. This approach will assist in accounting for managers/supervisors who struggle to identify strengths in promising employees.

Major Challenges Encountered and Resolutions:

Designing a Plan to Incorporate All Employee Types: The working group was comprised of both faculty and staff representatives and worked together in the end to define faculty specific development opportunities as well as staff specific development avenues but felt that the leadership development program established by HROE was foundational to all employee types.

Implementation and Sustainability of a Uniform Program: Given the decentralized functionality and lack of consistency in fostering a succession planning model universally recognizable by all university employees, the need for endorsement and support by all levels of the organization is paramount. While President Banks provided support and principles to the Working Group, the investment of personnel, technology and local support at the

managerial and college/division leadership is essential. To instill the importance of the program to the success of the university, personnel will be embedded within HROE structures and responsible for continual promotion and evaluation.   Furthermore, support by executive leadership and their fostering of engagement programs will establish the commitment by the university and expectations of college/division leaders as well as front-line managers.

Office and Learning/Training Infrastructure: Given the centralized approach to execute the Thriving Plan, appropriate space would need to incorporate both staff space as well as dedicated learning/training space. Sufficient space and associated equipment for 30 employees and training space for up to 100 employees per course per day is essential. While existing space may be satisfactory in early development, additional space will need to be secured, otherwise, the rental of non-HROE space will be required.

Engagement with remote locations: The landscape of Texas A&M University extends beyond the College Station campus. Working group members emphasized a need for better engagement and participation of the distributed workforce in the new Thriving Plan. Creating the model with mindfulness as to the implementation uniqueness of remote campuses along with purposeful visits and intentional outreach to these units will help with implementation strategies which should incorporate career planning and leadership development specific to varying structures and personnel.

Budget Impact:

Currently the burden of career and leadership development program costs is on individual departments. Given the integration of these programs into the institutional succession plan, this cost should be managed centrally.
> _Year 1:_ **$8,358,113**
> _Year 2:_ **$19,609,527***
> _Year 3:_ **$22,535,725***
> _Year 4:_ **_$26,228,438*_**

*attached Thriving Plan for Texas A&M University details the escalation of costs due primarily to the costs being accounted for centrally and associated costs of adding sufficient personnel and training courses to adequately train **ALL** employees across the university. Obviously these costs could be shared with participants and number of eligible employees could be weighted based on title and involvement in the Thriving Plan.

Key Logistical Issues to be Completed and Timeline:
- Launch Communication Plan (Fall 2022)
- Conduct workforce Planning Assessment and Secure Resources (Fall 2022/Spring 2023)
- Review rules, SAPs and Guides for relevance and amend as necessary (Spring 2023)
- Revise Performance Management and Employee Engagement Practices (Spring 2023)
- Align Career Paths & Competency Maps (Spring/Summer 2023)
- Foster Career Development Programs (Fall 2023)
- Launch Third Leadership Development Program (Fall 2023)
- Measuring Results (Fall 2023/Spring 2024)

Approved:

M. K. Banks

_____   _____September 10, 2022_____
M. Katherine Banks, Ph.D.   Date
President

*Approved with the following comments/exceptions to be addressed before further implementation:
- Consider a phased in approach to implementation.
- Work with the Vice President for Faculty Affairs and establish how faculty members will benefit given other existing ways of developing faculty leadership.
- The financial implications of the recommendations are to be determined.

Employee Thriving[1] Plan
Texas A&M University

Objective

To establish a robust talent development and management protocol for employees that leverages existing resources and cultivates high performing employees by:

1. Identifying effective talent management practices
2. Promoting growth and development of all employees
3. Developing equitable career development paths to gain professional expertise and/or formal leadership positions
4. Preventing employees from being overlooked for advancement opportunities
5. Building organizational capacity at all levels

Overview

In alignment with Texas A&M's Mission[2], Vision[3], Purpose[4], and Core Values[5], this thriving and talent management plan includes identifying talent and critical roles, creating career and

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[1] The MGT report refers to this as Succession Planning.

[2] Texas A&M University is dedicated to the discovery, development, communication, and application of knowledge in a wide range of academic and professional fields. Its mission of providing the highest quality undergraduate and graduate programs is inseparable from its mission of developing new understandings through research and creativity. It prepares students to assume roles in leadership, responsibility and service to society. Texas A&M assumes as its historic trust the maintenance of freedom of inquiry and an intellectual environment nurturing the human mind and spirit. It welcomes and seeks to serve persons of all racial, ethnic and geographic groups as it addresses the needs of an increasingly diverse population and a global economy. In the 21st century, Texas A&M University seeks to assume a place of preeminence among public universities while respecting its history and traditions.

[3] People are Texas A&M University's most valuable asset. The university strives to maintain an environment which encourages all employees to achieve their personal and professional goals and aspirations as we work toward achieving the university's mission. In this environment, each person's individuality and contributions are respected. Texas A&M University recognizes that all people have rights at work, including the right to be treated with respect and dignity, the right to be recognized and rewarded fairly for performance, and the right to a work environment free from discrimination and harassment. The university is committed to these rights. All people at Texas A&M University are expected to treat each other in accordance with these rights. Texas A&M University recognizes the importance of communication, and is committed to an environment which stresses open sharing of information and ideas, and values input from all people. Texas A&M University will strive for a work environment in which all people accept responsibility to contribute to the success of the University, and are empowered to do so. Finally, for this vision to become reality and endure, it must be continually communicated, supported and upheld.

[4] Texas A&M's Purpose Statement is to develop leaders of character dedicated to serving the greater good. This statement carries with it the responsibility, the traditions and the forward thinking of Texas A&M University exemplified by all who are associated with the university — its faculty and staff, and its current and former students. This can be defined by six Core Values.

[5] Core Values: Excellence, Integrity, Leadership, Loyalty, Respect and Selfless Service

leadership paths to foster a thriving mindset[6] and enhance the thriving skill set, and designing the thriving plan protocol for the retention of employees at Texas A&M University.

A thriving mindset is the belief that a person's capabilities and talent can be improved over time to the mutual benefit of the individual and organization, aligning personal aspirations to organizational goals. To foster a thriving mindset exemplifies Texas A&M's core values of leadership, loyalty, and excellence.

Competence[7] defines the knowledge, skills, abilities, and experiences necessary for employees to perform successfully. To enhance competence acknowledges that employee performance must make obvious our core values of respect, excellence, integrity, and selfless service.

THE THRIVING SELF & INSTITUTION
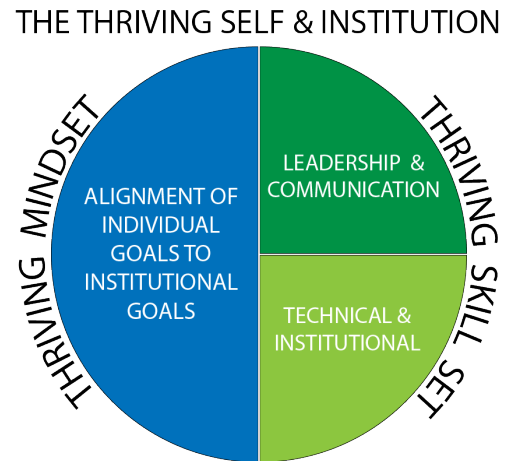
Proposed Approach

Identifying Talent and Critical Roles

Identifying both talent and critical roles allows for people and positions to be equally prioritized, recognizing that Texas A&M University cannot afford to lose high value and high potential employees nor allow critical roles to be vacant for extended periods of time.

Employees should be holistically evaluated once a year, at minimum, to monitor competency maturity, identify career and/or leadership development opportunities, and assess readiness[8] for career advancement. Holistic evaluation should include review of multiple verification methods, such as annual performance evaluations, 360 reports, quarterly performance discussion notes, competency assessments, return demonstrations, evidence of daily work, peer review, exemplars, and quality improvement monitors.

Critical roles can be further divided into leadership and mission-critical types. Director-level and above leadership positions should maintain a talent pool of competitive internal candidates. Mission-critical positions should be identified within each division/college.

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[6] The literature refers to this as the "Growth Mindset."

[7] Also referred to as the "Thriving Skill Set"

[8] Readiness refers to what extent an individual is ready or prepared to advance in their chosen path. Assessing readiness helps manage risk associated with path stagnation and provides insights for workforce planning.

Creating Career and Leadership Paths

Career and leadership paths should support the progressive development of core competencies for the different critical roles across the university. Core competencies for career and leadership paths should be established within a competency map which identifies the learning objectives and learning activities included in the career and leadership development programs.

Career Paths

Not all university employees desire supervisory duties or a leadership role. Thus, the thriving plan affords employees the opportunity to develop expertise within their profession.

1) Faculty Career Paths should include but are not limited to:
    a) Postdoctoral
        i) Multiple programs focused on mentoring, teaching, and career development sponsored by Office of Postdoctoral Affairs chapters within the Division of Research, College of Veterinary Medicine, College of Medicine, Institute of Biosciences & Technology – Houston, and Department of Chemistry
    b) Academic Professional Track (APT) faculty
        i) *Understanding the Promotion Process as an Academic Professional Track Faculty Member* program sponsored by Faculty Affairs
        ii) IDEATE Community (Scholarship of Teaching and Learning) sponsored by the Center for Teaching Excellence
        iii) Programs to help APT faculty gain a PhD in higher education administration (Service focus)
        iv) Programs to help APT faculty who would like to choose research as their 2nd area, or transition to TTF **(**Research focus)
    c) Tenure-Track faculty
        i) *Cultivating Early Career Success on the Tenure-Track* program sponsored by Faculty Affairs (Assistant Professor to Associate Professor)
        ii) *Roadmap for a Successful Tenure-Track Academic Career* program sponsored by Faculty Affairs (Assistant Professor to Associate Professor)
        iii) *The Tenure Process and Strategies for Preparation of Effective Materials* program sponsored by Faculty Affairs (Associate Professor to Full Professor)
        iv) *Mid-Career Learning Cohort, Deciding When to Pursue Full Professor,* and *Got Tenure, Now What?* programs sponsored by Faculty Affairs (Associate Professor to Full Professor)
        v) Programs to mentor the transition from Full Professor to National Academy Member
    d) Lateral paths that provide growth opportunities through varied experiences for all tracks

2) Staff Career Paths should include but are not limited to:
   a) Level I to Level II to Level III to Level IV or Assistant to "Position" to Senior to Lead

Example	
HR Generalist IV	Lead Water Quality Technician
HR Generalist III	Senior Water Quality Technician
HR Generalist II	Water Quality Technician
HR Generalist I	Water Quality Technician Assistant

   b) Career development programs should help employees gain awareness, learn and practice, and continue to develop what they need to know and do to be successful in their chosen profession
   c) Career development programs might enable staff employees to earn professional certifications by professional organizations or continuing education credits.

Leadership Path

The Organizational Development department within the Division of Human Resources and Organizational Effectiveness has created a progressive, competency-based leadership development model framed around 4 levels:

1) Leading Self (For individual contributors; Everyone is a leader at Texas A&M)
   Following the university's progressive leadership development framework, the Leading Self leadership development program helps university employees build foundational leadership competencies to enable a common language, practice, and culture (i.e., a thriving mindset) across the university community. The Leading Self leadership development program focuses on six competencies: Texas A&M University's Mission, Vision, Values; Interpersonal Effectiveness; Diversity & Inclusion; Customer Service; Problem Solving & Process Improvement; and Adapting to Change.

2) Leading Others (Individual Contributor to Front-line Leader)
   The intent of the Leading Others leadership development program is to enhance the leadership competencies of those who lead groups of people. Leading Others focuses on eight competencies: Ethics, Rules, Regulations, & SAPs; Adapting Interpersonal Style & Communication; Valuing Differences; People Management & Development; Team Development; Conflict Management; Financial Management; Project & Change Management.

3) Leading the Function (Front-Line Leader to Mid-Level Manager)
   The intent of the Leading the Function leadership development program is to help leaders transition to leading more strategically.

4) Leading the Organization (Mid-Level Manager to Executive)
   The intent of the Leading the Organization leadership development program is to help leaders transition to leading for the future.

Recognizing the unique conditions for faculty members who have assumed administrative roles, the Division of Faculty Affairs sponsors additional, supplemental leadership development programs:

- Academic Leader Learning Community
- Department Head Development Series
- ADVANCE Administrative Fellows
- Faculty Success Fellows

The Division of Faculty Affairs also serves as liaison for Texas A&M University's participation in the SEC Academic Leadership Development Program.

Designing Thriving Plan Protocol

Expectations regarding appropriate competency level as well as career and leadership development program participation should be established at key intervals for each position level indicated. The expectations established at each proposed interval act as a set of general guideline which should be applied with an element of reasonableness. For example, a new leader should not be made to complete both the Leading Self and Leading Others program. It should also be made clear that an evaluation of readiness for advancement does not guarantee promotion or reclassification.

1) Entry-level positions

   a) Shall be provided a career development path within the first 90 days[9] of first-time employment or new role

   b) Shall be enrolled in Leading Self within 6 months of first-time employment

   c) Shall between the 18th and 36th month of new position be evaluated for readiness to advance along career or leadership path by supervisor and/or OD Specialist

2) Mid-level positions

   a) Shall demonstrate an appropriate level of competence and expertise prior to serving as an interim and/or within the first 6 months of assuming a new position.

   b) Shall be enrolled in Leading Others prior to or within the first 6 months of assuming supervisory duties.

   c) Shall be enrolled in Leading the Function prior to or within the first 6 months of assuming an upper, mid-level leadership position (i.e., Director/Department Head, Executive Director, Assistant/Associate Vice President, Assistant/Associate Dean).

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[9] The First 90 Days: Give New Hires a Career Road Map (td.org)

    d) Shall between the 18th and 36th month of new position be evaluated for readiness to advance along career/leadership path by supervisor and/or OD Specialist

3) Executive/Mastery-level positions

    a) Shall demonstrate an appropriate level of competence and expertise prior to or within the first 6 months of assuming a new position.

    b) Shall be serve as a mentor or coach

    c) Shall be enrolled in Leading the Organization prior to or within the first 6 months of assuming an executive-level leadership position.

Additional Organizational Components to Consider

Career Ladders[10]

Career and Leadership Paths are dependent upon the existence of easily recognizable career ladders within each job family. Positions within the career ladders should have job descriptions which reflect the core competencies needed and list internal career and leadership development programs and experiences as preferred. Supervisory duties should not be the only driving factor to advance through a career ladder. Upper-level positions (e.g., level III, IV, V or Lead, Senior) within a career ladder should emphasize experience, expertise, mentoring, and coaching.

Performance Management

While our current performance review process creates a foundation for on-going performance discussions and assessment, changes will need to be made to the performance evaluation tool as well as to the annual process. The performance evaluation tool should be modified to allow for all employees to be assessed on the Texas A&M core values as well as core competencies relevant to their position. Good practice states that performance discussions should be conducted on a quarterly basis.

Rules and Practices

Existing Rules, SAPs, and practices should be reviewed to ensure they provide the structure needed for the thriving and talent management plan to succeed. At minimum, the following items should be reviewed and modified, if needed.

- Employee Tuition Assistance
- Merit Salary Increase
- Educational Release Time
- Job-Related Skill Enhancement Pay
- Temporary Salary Increase
- Allocation of Professional Development Funds

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[10] The Benefits of Career Ladders (thebalancecareers.com)

New practices that might be needed to provide further support are:
- Make clear incentives for furthering the vision and mission
- Partnership and administrative support to division/college-based professional development efforts/teams/committees

Mentoring[11] and Coaching[12]

To support advancement through the upper-levels of career paths and to enrich leadership development programs, formal mentoring and coaching programs should be developed to support good practice. Additionally, employees should be provided the opportunity to seek mentoring and coaching relationships outside of the university.

Equity

A mechanism should be put into place in order to account for personality conflicts and style differences. Competency verification methods should allow employees the opportunity to be evaluated by individuals (e.g., peers and customers) other than their manager/supervisor. This approach will assist in accounting for managers/supervisors who struggle to identify strengths in promising employees.

The thriving plan as outlined will increase the potential for internal promotion and advancement. This does not negate the benefits of recruiting more broadly to assist in diversifying employees across the institution. For each vacancy, consideration should be given to the talent needs of departments, colleges, and divisions. Should the area in question benefit from significant change, a national search should be entertained. This is especially true for those positions in the leadership path. Further, Diversity, Equity, and Inclusion (DEI) metrics should be included as a measures of success for recruiting, promotion, and retention to monitor for potential unintended trends.

Staffing

1) Organizational Development (OD) Specialist
   In alignment with recent centralization of Human Resources services, an OD Specialist I-V should be placed in each HR Service Hub (1:150 service ratio) to help supervisors and employees fully adopt the thriving plan. The OD Specialist, based on level of expertise, might assume some or all of the following responsibilities:
   a) Coordinate employee's participation in university orientation program
   b) Coordinate and/or facilitate department orientation activities (e.g., UIN, NetID, network access account, email, keys/door access, parking, University ID, department intranet, time keeping system, required training, etc.)
   c) Assist employee with new hire benefits election
   d) Coordinate department welcome event/activity

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[11] What is Mentoring? | ATD
[12] The Value of Leadership Coaching | Sounding Board Inc

e) Assist with annual performance review process
f) Coordinate diversity, equity, and inclusion (DEI) initiatives
g) Provide Workday, TrainTraq, and/or Brightspace assistance
h) Monitor completion of required training and communicating completions/past due assignments
i) Refer requests for customized organizational development services to HROE Organizational Development department
j) Assist managers with preparing for quarterly high, middle, low performance discussions
k) Assist managers with competency assessment and addressing gaps
l) Assist with talent pool management (e.g., creating talent profiles, monitoring readiness indicators, progression through career and leadership paths, recommending qualified employees for advancement opportunities,)
m) Assist managers in determining an appropriate approach to fill critical roles, both leadership and mission-critical.
    i) Should this position be made available internally only based on readiness of the talent pool or be a national search?
    ii) This conversation is important for increasing and enhancing representation of underrepresented populations as well as introducing diverse perspectives from other institutions/organizations for needed expertise and advanced competence.
n) Assist with learning & development plan process
o) Provide administrative oversight for career development programs
p) Assist with administrative oversight for mentoring and/or coaching partnerships
q) Coordinate employee engagement activities
r) Facilitate career development learning activities development by HROE Organizational Development department
s) Assist HROE Organizational Development department with facilitating university orientation and onboarding programs, events, and/or activities, as needed
t) Assist HROE Organizational Development department with facilitating employee engagement activities, as needed

2) Organizational Development Department Staff
Additional positions in the Organizational Development department are needed to assess, design, develop, implement, and evaluate career development programs, leadership development programs, mentoring & coaching programs, and employee engagement initiatives. These positions may leverage existing structures (e.g., take leadership over the existing Staff Development Committee that facilitates monthly development opportunities for staff and facilitates the division's new employee orientation).
    a) Facilitator I-V

       b) Instructional Designer I-V
       c) Learning & Organization Development Consultant I-V
       d) Program Manager, Coordinator I-II, Assistant, Aide

Minimum staffing needed to create each leadership development program is 1 Learning & Organization Development Consultant, 2-4 Instructional Designers, 1 Program Manager/Coordinator, 1 Facilitator. Minimum staffing needed to implement and operate each leadership development program is 1 Program Manager, 1 Program Coordinator/Assistant, 3 Facilitators.

Minimum staffing to create a career development program is 1 Learning & Organization Development Consultant, 2 Instructional Designers, 1 Facilitator (if applicable). Implementing, managing and maintaining career development programs is the shared responsibility of the OD Specialist, Learning & Organization Development Consultant, and Department/College/Division leaders.

Minimum staffing to create mentoring and coaching programs, as well as employee engagement initiatives, is 1 Learning & Organization Development Consultant and 1 Program Coordinator/Assistant.

3) Division of Human Resources and Organizational Effectiveness (HROE) Staff
Additional positions in HROE are needed to review current career ladders, define career ladder standards, revise career ladders and/or position descriptions as competencies are finalized, as well as process reclassifications as a result of employee progression through proposed career and leadership paths.
       a) Classification and Compensation Analyst
       b) Senior Classification and Compensation Analyst

Additional positions are also needed to implement employee engagement initiatives.
       a) Program Manager
       b) Program Coordinator I-II
       c) Program Assistant

4) Division/College Staff
Additional positions in departments are needed to divert workload from supervisors to allow them to fully assume the responsibilities for supervising, mentoring, and developing employees.

IT Systems and Software
1) Workday Talent and Performance product extensions and/or enhancements
       a) The talent profile

      b) Competency management
      c) Reporting and dashboards
      d) Goal alignment
      e) Calibration
      f) Succession planning/Talent pipeline
      g) Real-time feedback
      h) Mentors and connections

2) Continued implementation of the Brightspace learning management system
      a) Leading Self (complete)
      b) Leading Others (Summer 2022)
      c) Leading the Function
      d) Leading the Organization
      e) All career development programs

3) Website development and maintenance

Infrastructure

1) Office space and technology resources for new employees
      a) Cubicle/office space
      b) Furniture
      c) Computers/laptops, monitors, keyboards, mice, etc.
      d) Phones

2) Dedicated learning/training space
Due to office relocations in 2021, the Organizational Development (OD) department lost 3 training spaces dedicated 100% to employee development programs. Although space has been secured in the General Service Complex building for 2022 and 2023, the current agreement giving the OD department right of first refusal for the space could be revoked. It is recommended that a space on campus be dedicated to delivering career and leadership development programs and managed by the OD department. Depending on the AV capabilities of the space, renovations may be necessary to ensure a 21st century learning experience for employees.

Employee Engagement

1) Employee Engagement Surveys
It is important that university employees are connected to the mission, vision, and values of Texas A&M through their work. Employee engagement should be a key performance indicator to the health of the institution. Thus, Texas A&M should measure and monitor employee engagement through annual surveys, such as Gallup Employee Engagement Q12 survey[13] or Qualtrics Employee Engagement[14].

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[13] The Engaged University by Gallup
[14] Qualtrics Employee XM Employee Engagement

Texas A&M should create incentives for demonstrating commitment to the mission and living out the core values. Texas A&M must be consistent in its tolerance and penalties of individuals violating these guiding principles.

2) Stay Interviews[15] for High Potential and/or High Performing Employees
The Society for Human Resource Management (SHRM)[16] conducted a study amongst HR professionals and found the following questions were most recommended for stay interviews:

   a) When you are on your way to work, what is it you are most looking forward to?
   b) What have you learned working here?
   c) What would you like to learn working here?
   d) When have you considered leaving the company, and why?
   e) What made you decide to stay?
   f) What can I do to make your job better?
   g) Do you feel valued?

The stay interview may be conducted by the supervisor/manager or OD Specialist. The interview notes of the stay interview should be submitted to HROE Organizational Development for review and evaluation of action plans in accordance with the needs that are disclosed.

3) Monthly Town Halls
The university president and executives should hold monthly town halls where all employees can attend and share concerns with executive leadership in an open forum. Town halls should not be structured as a leadership presentation. The location should rotate every month to facilitate employees who work in different locations.

   a) The Faculty Senate/University Staff Council should create a website where employees can submit anonymous questions. The Faculty Senate/ University Staff Council Executive committee will curate this list of questions to collect an appropriate list of Frequently Asked Questions each month. By having the Faculty Senate/University Staff Council manage and curate the list of questions, this avoids any perception that certain questions are being purposefully not answered by the upper administration.
   b) The Faculty Senate/University Staff Council will then post the answers on a website accessible to all employees following each Town Hall.

4) Senior Leader Rounding[17]

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[15] The Value of Stay Interviews - Exodus HR Group
[16] The Power of Stay Interviews for Engagement and Retention, Second Edition (shrm.org)
[17] Leader Rounding

The president or a suitable representative should visit each division/college once a semester. All employees should have an equal opportunity to engage leadership during this visit.

5) Orientation[18] and Onboarding[19]

Create an integrated, multi-faceted program to build engagement with new employees before their first day and sustain them through their first year of employment. Major phases with targeted processes, practices, and/or programing should include:

    a) Pre-employment

    b) Start Date & Orientation

    c) First 30 days

    d) First 90 Days

    e) First Year Experience

6) Employee Resource Groups (ERGs)[20]

Model an ERG structure after how Student Organizations are sponsored and/or managed by Student Activities department within Student Affairs to allow employees the opportunity to serve as representatives of the Staff Voice (i.e., elevating University Staff Council to the same level of Faculty Senate) as well as the opportunity to organize themselves based on shared characteristics, values, interests.

Implementation Timeline

The proposed implementation timeline is based on the assumed approval of all requested resources and associated costs. It should be noted that a delay in securing resources or reduced funding could impact the time, quality, and/or scope of implementation.

Secure Resources (Summer and Fall 2022)

1. Change Management
   a. Initiate Communication Plan
2. Needed Resources
   a. Conduct workforce planning assessment to determine additional positions needed at division/college level to support supervisors
   b. Create and seek approval for new positions needed to support Thriving Plan
   c. Initiate recruiting process for approved positions
   d. Secure office space and technology resources for new employees
   e. Review features and functions of Workday Talent & Performance product

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[18] [The Key Difference Between Employee Onboarding and Orientation (trainingindustry.com)](trainingindustry.com)

[19] [Understanding Employee Onboarding (shrm.org)](shrm.org)

[20] [What Are Employee Resource Groups (ERGs)? | Great Place to Work®](greatplacetowork.com)

      f. Seek buy-in from Workday HCM Advisory group for desired feature release

      g. Identify a vendor for Employee Engagement survey

3. Identifying Talent & Performance Management

      a. Current employees complete Workday Talent Profiles

      b. Determine positions to be included in thriving plan

          i. Identify entry-level, mid-level, executive/expert-level positions

          ii. Identify mission-critical roles for each job family

          iii. Count of Director and above positions and/or people

          iv. Count of mid-level positions to complete Leading Others program

4. Career Ladders for Career Track

      a. Review current career ladders

      b. Determine gaps which might limit career advancement

      c. Define standards for career ladder structure, as needed

5. Career Development Programs

      a. Conduct needs assessment to determine faculty development needs

      b. Review current faculty development programs

      c. Determine gaps which might limit career advancement

6. Leadership Development Programs

      a. Sustain in-person delivery of Leading Self & Leading Others programs

      b. Begin developing 100% virtual delivery options for both programs

7. Performance Management

      a. Seek approval from TAMUS to modify current Workday Performance Review tool to include TAMU core values, replacing system behavior competencies.

8. Review rules, SAPs that may be impacted by or impact thriving plan

9. Orientation & Onboarding

      a. Review current orientation and/or onboarding efforts @ dept, college, division, university level

Year 1 (2023)

1. Continue to secure resources needed to support Thriving Plan, as needed

2. Career Ladders for Career Tracks

      a. Revise current career ladders to meet new standards, prioritizing those that fulfill mission-critical roles

      b. Create new career ladders to fill identified gaps, prioritizing those that fulfill mission-critical roles

3. Career Development Programs

      a. Begin identifying competencies for career ladders fulfilling mission-critical roles within each job family by engaging stakeholders to create competency map

      b. Design & develop learning activities and competency assessments

      c. Revise current and/or create new faculty development programs

      d. Implement new career development programming

4. Leadership Development Programs
    a. Expand enrollment to Leading Self and Leading Others programs
    b. Begin designing and developing Leading the Function program
5. Performance Management
    a. Educate HR service hubs, supervisors, and employees on change to Performance Review tool in Workday
    b. Beginning April 1, 2023, expand performance management activities to include:
        i. Learning & Development plan
        ii. Leadership competency assessment
    c. Educate HR service hubs, supervisors, and employees on additional performance management activities.
6. Rules & Practices
    a. Edit as needed; Consider implications of guidance doc vs Rule/SAP
    b. Seek approval through designated process
    c. Coordinate effectiveness date with launch date of related Thriving Plan element(s)
    d. Establish ownership for on-going review & renewal process
7. Mentoring & Coaching Programs
    a. Design the mentoring and coaching experience
    b. Implement the mentoring and coaching platform
    c. Begin developing training for mentors and coaches
8. Employee Engagement
    a. Identify/customize/create employee engagement survey
    b. Educate HR service hubs, supervisors, and employees on purpose, interpretation, deadline, access, etc..
    c. Conduct survey to set organizational performance benchmark
    d. Explore feasibility of implementing employee rounding program
    e. Explore feasibility of formalizing semi-annual town hall events by university senior leaders
9. Orientation & Onboarding
    a. Engage stakeholders to envision ideal future
    b. Create working group to design new programming
    c. Develop programming and resources
    d. Educate HR service hubs, supervisors, and employees on new programming and resources
    e. Implement new programming

Year 2 (2024)

1. Continue to secure resources needed to support Thriving Plan, as needed
2. Career Ladders for Career Tracks
    a. Continue to revise current career ladders to meet new standards, prioritizing those that fulfill mission-critical roles

    b. Continue to create new career ladders to fill identified gaps, prioritizing those that fulfill mission-critical roles
3. Career Development Programs
    a. Continue identifying competencies for career ladders fulfilling mission-critical roles within each job family by engaging stakeholders to create competency map
    b. Continue designing & developing learning activities and competency assessments
    c. Continue implementing new career development programming
4. Leadership Development Programs
    a. Continue to expand enrollment to Leading Self and Leading Others programs
    b. Implement Leading the Function program
    c. Begin developing 100% virtual or asynchronous delivery options for Leading the Function programs
    d. Begin designing and developing Leading the Organization program
5. Performance Management
    a. Educate HR service hubs, supervisors, and employees on change to Performance Management Portfolio in Workday
    b. Beginning April 1, 2024, expand performance management activities to include:
        i. Position competency assessment*
        ii. High, middle, low performance conversations
    c. Educate HR service hubs, supervisors, and employees on additional performance management activities.
6. Rules & Practices
    a. Edit as needed; Consider implications of guidance doc vs Rule/SAP
    b. Seek approval through designated process
    c. Coordinate effectiveness date with launch date of related Thriving Plan element(s)
    d. Establish ownership for on-going review & renewal process
7. Mentoring & Coaching Programs
    a. Finish developing training for mentors and coaches
    b. Identify and train individuals for internal mentoring and coaching networks
    c. Educate mentees/leaders on mentoring and coaching partnership expectations
    d. Launch mentoring and coaching programs
8. Employee Engagement
    a. Interpret survey results and set organizational performance benchmark
    b. Set and cascade organizational performance goal related to employee engagement
    c. Educate HR service hubs, supervisors, and employees on organizational goals and cascading goals to division/college and department level.
    d. Create 90-day action plans at division/college-level to take action to achieve stated goal
9. Orientation & Onboarding

a. Continue educating HR service hubs, supervisors, and employees on new programming and resources
b. Enhance new programming

Year 3 (2025)

1. Continue to secure resources needed to support Thriving Plan, as needed
2. Career Ladders for Career Tracks
    a. Continue to revise current career ladders to meet new standards, prioritizing those that fulfill mission-critical roles
    b. Continue to create new career ladders to fill identified gaps, prioritizing those that fulfill mission-critical roles
3. Career Development Programs
    a. Continue identifying competencies for career ladders fulfilling mission-critical roles within each job family by engaging stakeholders to create competency map
    b. Continue designing & developing learning activities and competency assessments
    c. Continue implementing new career development programming
4. Leadership Development Programs
    a. Sustain Leading Self and Leading Others programs
    b. Expand enrollment in Leading the Function program
    c. Implement Leading the Organization program
    d. Begin developing 100% virtual or asynchronous delivery options for Leading the Organization program
5. Performance Management
    a. Educate HR service hubs, supervisors, and employees on change to Performance Management Portfolio in Workday
    b. Beginning April 1, 2025, maintain performance management activities to include:
        i. Learning & Development Plan
        ii. Leadership competency assessment
        iii. Position competency assessment*
        iv. Manager notes for High, middle, low performance conversations
6. Rules & Practices
    a. Edit as needed; Consider implications of guidance doc vs Rule/SAP
    b. Seek approval through designated process
    c. Coordinate effectiveness date with launch date of related Thriving Plan element(s)
    d. Establish ownership for on-going review & renewal process
7. Mentoring & Coaching Programs
    a. Expand internal mentoring and coaching networks, as needed
    b. Continue educating mentees/leaders on mentoring and coaching partnership expectations
    c. Sustain mentoring and coaching programs
8. Employee Engagement

a. Interpret survey results and compare to organizational benchmark
b. Set and cascade organizational performance goal related to employee engagement
c. Educate HR service hubs, supervisors, and employees on organizational goals and cascading goals to division/college and department level.
d. Create 90-day action plans at department-level to take action to achieve stated goal
9. Orientation & Onboarding
   a. Continue educating HR service hubs, supervisors, and employees on new programming and resources
   b. Sustain new programming

Estimated Costs

Currently the burden of career and leadership development program costs is on individual departments. Given the integration of these programs into the institutional succession plan, this cost should be managed centrally. The costs, as outlined below, of this plan are extensive. One recommendation is to utilize the Administrative Service Department model established in Policy 21.01.05 to ensure on-going funding for career and leadership development programs as well as temporary salary increases for interim appointments, job-related skill enhancement pay, and equity increases. Another recommendation is better and more direct utilization of salary savings. In prior fiscal years, individual departments were able to utilize their salary savings to fulfill needs within their departments, including, but not limited to:

1) Interim stipends
2) One-time merit
3) One-time development expenses
4) Searches
5) Onboarding
6) Reclassifications and equity adjustments for staff (though salary savings are not recurring money, the regularity of staff turn over in entry-level positions allowed for the management of this money to fulfill these needs)

As a part of this recommendation, an evaluation of salary savings and how that is allocated would be productive. It is recommended that there be consistent communication and expectations of how and when that money can be accessed to fulfill the referenced needs above.

Description	Secure Resources	Year 1	Year 2	Year 3
Leading Self	N/A	$967, 500.00	$3,337,500.00	$3,450,000.00
Leading Others	N/A	$593,750.00	$1,225,000.00	$1,262,500.00
Leading the Function	$100,000.00	$321,442.00	$1,414,350.00	$2,828,700.00

Description	Secure Resources	Year 1	Year 2	Year 3
Leading the Organization	N/A	$375,000.00	$825,000.00	$849,750.00
Career Development programs	N/A	$5,010,000.00	$5,520,000.00	$6,510,000.00
Faculty Development programs	N/A	$1,500,000.00	$2,250,000.00	$3,000,000.00
Increased Professional Development Funds	$4,000,000.00	$4,000,000.00	$2,000,000.00	$2,000,000.00
Mentoring program	N/A	$996,000.00	$650,000.00	$580,000.00
Coaching Program	$156,600.00	$507,416.00	$698,816.00	$1,203,416.00
Orientation and Onboarding programming	$360,000.00	$2,522,360.00	$2,598,030.80	$2,675,971.72
Employee Engagement Survey	$250,000.00	Recurring expense for platform captured under IT System category.		
Organizational Development Specialist I - V positions (1 per HR Service Hub)	$470,496.00	Allow for avg. 2% increase year over year for merit.		
Organizational Development staff positions (i.e., 7 facilitators, 9 instructional designers, 8 consultants, 9 program managers/coordinators, 7 managers)	$1,905,113.60	$922,916.80 / Allow for avg. 2% increase year over year for merit.	$357,468.80 / Allow for avg. 2% increase year over year for merit.	Allow for avg. 2% increase year over year for merit.
HROE staff positions	$237,702.40	$179,961.60 / Allow for avg. 2% increase year over year for merit.	$135,408.00 / Allow for avg. 2% increase year over year for merit.	Allow for avg. 2% increase year over year for merit.
IT Systems	$732,900.00	$1,628,180.00	$1,781,150.00	$1,868,100.00
Infrastructure*	$145,000.00	$85,000.00	$40,000.00	
	*This cost projection does not account for need of dedicated training space, lease of office space, and/or purchase of office furniture.			
Division/College Staff to divert workloads				
TOTAL	**$8,358,113**	**$19,609,527**	**$22,535,725**	**$26,228,438**

Measuring Results

1. Maintain quality (i.e., effectiveness of content and delivery, relevancy to job, and would recommend) and anticipated impact (i.e., will enable better job performance, linked to business needs, job application of knowledge & skills) ratings at 80% or higher for leadership development programs
2. Increase and/or maintain quality (i.e., effectiveness of content and delivery, relevancy to job, and would recommend) and anticipated impact (i.e., will enable better job performance, linked to business needs, job application of knowledge & skills) ratings at 80% or higher for career development programs
3. Maintain Average Increase in Knowledge at 75% or higher for leadership development programs
4. Increase and/or maintain Average Increase at 75% or higher in Knowledge for career development programs
5. Increase internal promotions by 5%
6. Benchmark employee engagement in year 1; Increase employee engagement year-over-year.
7. Decrease in employee turnover for employees with less than 1 year of service/tenure by 10% and for employees with 5-10 years of service/tenure by 5%.

Communication

The communication plan for the scope of work planned for Securing Resources phase should include:

1) Socializing approved Thriving Plan with key stakeholders, such as university vice presidents, Faculty Senate, and University Staff Council.
2) Communicating staffing needs to the Talent Management department in the Division of Human Resources and Organizational Effectiveness to assist with recruiting and hiring processes.
3) Communicating Workday needs to Texas A&M System Office of Information Technology and Human Capital Management Advisory Group.
4) Reconvening Working Group #34 to vet employee engagement platform
5) Communication to employees and managers regarding completion of Workday Talent Profiles.
6) Collaboration with Faculty Affairs to determine role and responsibility in faculty development training needs assessment, revisions to current programs, and/or creation of new programs.
7) Communicating with college/division leadership regarding orientation & onboarding efforts, as well as career ladder/career development programs.

Project plans for each scope of work outlined in Phases Year 1 – 3 should include a detailed communication plan to engage stakeholders at key milestones to ensure successful implementation.