



**University Staff Committee  
Meeting Minutes  
October 15, 2020, 10:00 – 11:30 a.m.  
Virtually on TEAMS**

1. Call to order: Meeting was called to order at 10:00 am by USC Chair, Kim Mezger.
2. Roll call: Ken Noe, Brenda Beck, Sara Chaloupka, Teri Ternes, Paul Wikgren, Sue Machuca, Diane Grubisha, Dolly Jackson, Olivia Raasch, Barbara Holschbach, Tina Tackmier, Eric Knapowski, Heidi Nell, Barbara Tomashek-Ditter, Kate LaCount, Christine Cox, Lea Truttmann, Julie Flenz, Cheryl Charon, Patrick Goggins, Jane Donlon, Marina Lyudmer, Sarah Locke, Nancy Balaban, Jennifer Van Beek, Bea Thao Yang, Danielle Roberts, Wayne Chaloupka, Loretta Rafter, Kurt Nimmer, Lisa Francl, Monika Pynaker, Sherri Meglic, Lisa Glinski, Colleen Cowling, Holly Keener, Kaitlyn O'Claire, Denise Baeten; Nate Rusch, Jared Koch, Toby Froelich, Mary Kate Ontaneda, Jason Willard, Joan Schaller, Amanda Wildenberg, Jolene Truckenbrod, Lore Slattery, Matthew Lieberenz, Julliann Duprey
3. Treasurer's report & update: Teri provided an update (see attached). FYI: for the new PDC Chair, please be aware that we do get reimbursement requests for professional development reimbursements from Academic Staff. Discussed disconnect with awareness of what employment classification people fall under.
4. Old Business
  - a. Election Results: (results are attached). Strategic Budgeting Committee has started back up with meeting per Monika. Kim motioned to approve; Sue 2<sup>nd</sup> the motion. USC Committee members unanimously approved the election results. Holly will finalize the listing. Holly has designated conveners for Personnel Committee (Sarah Locke) and PDC (Barbara Tomashek-Ditter) to set up meetings within each group to determine a chair. Theresa will convene the new USC to determine a new USC Chair, USC Vice-Chair, USC Treasurer.

UW System Rep (annual renewing appt). Teri is interested in continuing to serve. Kate LaCount will serve as alternate for 2020-2021.
  - b. Professional Development Survey Results: (see attached) Please read through regarding the results. Joint Committees met, have 1 2-hour workshop set up with RN Jesse. Information is on the minutes from the PDC. Teri will pass along all of her information to the new PDC chair when that has been determined.
5. New business
  - a. Proposed Scholarship Policy: The Chancellor (during his time as the Provost) had been working on this, and Interim Provost Burns has finished it. Some donors are putting parameters on how to determine the recipients. Advancement and Provost are working to switch these to more needs-based. The University Staff Committee has decided to defer this to the Academic Staff Council and Faculty.
  - b. Housing of statements and resolutions: Committee discussed the housing of various statements and resolutions, such as the workload resolution and pandemic policy. There is a Sharepoint site set up specifically for these documents, however some of these should also be on our USC website. Another idea was to set up a Teams folder for these documents (which would automatically also set up a SharePoint site).

- c. Brad Gajeski, Facilities to discuss at-risk layoff notice: UW Superior has contract with outside vendor for groundwork, including plowing/snow removal, etc. UWGB is in the expiration phases to determine if it would be beneficial to go with an outside contractor, SSC, to do the groundwork and such, or stick with our current set up. Contactor visited the campus on October 14, 2020. If we do award the contract to the outside vendor, they will follow UWGB policies/procedures and still hire students, etc. SSC is a national company and works all over the US. Brad was unaware of SSC's benefits and compensation packages. Final proposal had not been submitted at time of meeting, so some information that was asked about was not readily available.

Some questions asked revolved around the layoff notice, which can be extended, depending on the situation. Also, questions/concerns about care for the Arboretum (per Brad, the Arboretum is maintained by the Center for Biodiversity and Facilities helps as needed).

Other questions revolved around ensuring there is enough staffing for the coming winter work. Per Brad, Facilities is evaluating how snow removal will occur this winter due to COVID and less people on campus, and this could be a non-issue. There were also concerns about what equipment will SSC be using, the University's equipment or will they be bringing their own? Will the SSC employees be using our Facilities building? Per Brad, this is all still be worked out. Kim ended the discussion with Brad with a request that he forward on our comments and concerns to Paul Pinkston.

After Brad left the meeting, Sue asked how many employees are at-risk. Per Toby, there are 3 people left out of technically 7. Grounds also has permission to hire up to 8 student employees, but they had 6 last year.

Sue also asked if someone in HR could connect with Grounds to clarify at-risk versus layoff.

## 6. Adjournment

11:55 AM

Minutes approved by USC Executive Committee on November 19, 2020

The next USC meeting will be on November 19<sup>th</sup> at 10:00am, virtually on TEAMS.



**University Staff Committees, Campus Joint Governance  
& Campus Appointive Committee & Working Group Reps  
FALL 2020**

<b>University Staff Committee</b>		
Teri Ternes	USC Member	2019-2022
Dolly Jackson	USC Member	2019-2022
Jayne Kluge	USC Member	2018-2021
Theresa Mullen	<b>Secretary</b>	2018-2021
Monika Pynaker	USC Member	2020-2023
Kim Mezger	USC Member	2020-2022
Lisa Francl, Manitowoc	USC Member – Manitowoc	2020-2023
Kaitlyn O'Claire, Marinette	USC Member – Marinette	2019-2021
Sue Machuca, Sheboygan	USC Member - Sheboygan	2019-2022

<b>Election Committee</b>		
Holly Keener	EC Member   <b>Chair 18-20</b>	2018-Sept. 2021 (extended to a 3-yr term)
Brenda Beck	EC Member	2020-2023
Kate LaCount	EC Member	2019-2022

<b>Personnel Committee</b>		
Sarah Locke	PC Member	2019-2022
Savanna Mishler (no longer with UWGB)	PC Member	2020-2021 (replacement term)
Jenny Charapata	PC Member	2020-2023
Sue Machuca	PC Member	2020-2023
Brenda Beck	PC Member	2020-2022
Christopher Paquet	AVC, Human Resources	Ex-officio, non-voting

<b>Professional Development Committee</b>		
Lisa Schmelzer	PDC Member	2019-2022
Barb Tomashek-Ditter	PDC Member	2019-2022
Sue Machuca	PDC Member	2020-2023
Kaitlyn O'Claire	PDC Member	2020-2023
Mary Kate Ontaneda	PDC Member	2020-2023

<b>UW System University Staff Representative</b>	
Teri Ternes	2019-2020
Holly Keener   Kim Mezger, back-up	2019-2020

(Campus Joint Governance & Campus Appointive Committee & Working Group Reps on page 2)

Joint Governance Committees		
Committee	Rep	Term
Awards & Recognition Committee (appointed)	Amanda Doperalski (said yes)	2020-21
Committee on Workload and Compensation (USC appointed)	Jenny Charapata	2018-21
	Heidi Nell (said yes)	2020-23
	Sara Chaloupka	2019-22
	TBD, Liaison to USC, non-voting	2019-20

Campus Appointive Committees & Working Groups		
Committee	Rep	Term
Chancellor's Council on Diversity & Inclusive Excellence	Theresa Mullen	NA
Committee on Disability Issues	Raelynn Smith	2019-22
	Theresa Mullen, ex-officio	NA
Health & Safety Committee (B&F Appointed)	Wayne Chaloupka	2019-21
	Sherri Meglic (said yes)	2020-22
Master Plan Advisory Committee	Holly Keener Fred Kennerhed Kim Mezger	NA
Strategic Budgeting Committee	Monika Pynaker TBD (alternate)	NA
Wellness Committee	Lisa Schmelzer	2019-21

**University of Wisconsin-Green Bay**  
**University Staff Professional Development Report**  
**10/15/2020**

The University Staff Professional Development Committee [USPDC] has not met since March due to the COVID-19 pandemic. The USPDC met with the Academic Staff Professional Development Programming Committee [ASPDPC] On September 24 and October 8, 2020.

**FALL CONFERENCE:**

After elections are finalized for 20-21, the committee will move forward to plan the 2021 conference. We currently have \$5499.51 in the 136 account.

**PROFESSIONAL DEVELOPMENT FUNDS:**

No requests pending. Reimbursement for 2020-21 is 50% of allowable expenses; max reimbursement of \$300. The reimbursement request form can be found on our website.

**JOINT WORKSHOPS:**

The 2020-21 interest survey is attached.

We have contracted with Nurse Jesse for a virtual workshop, "It Makes Me Happy". The workshop offers attendees tools to reconnect with their authentic selves and a simple formula to find joy in everyday living. The workshop is a mix of storytelling, self-assessments and interactive "play" to get started on the "It Makes Me Happy!"™ journey. The workshop will be presented in Blackboard on November 12, 9-11AM and will repeat on November 18, 1-3pm. The speaker cost is \$400/session, to be split equally. Registration details will be sent via email.

The joint AS/US professional development committees agreed to meet on an 'as needed' basis in the future. At this time, we plan to reconvene in January.

**OTHER:**

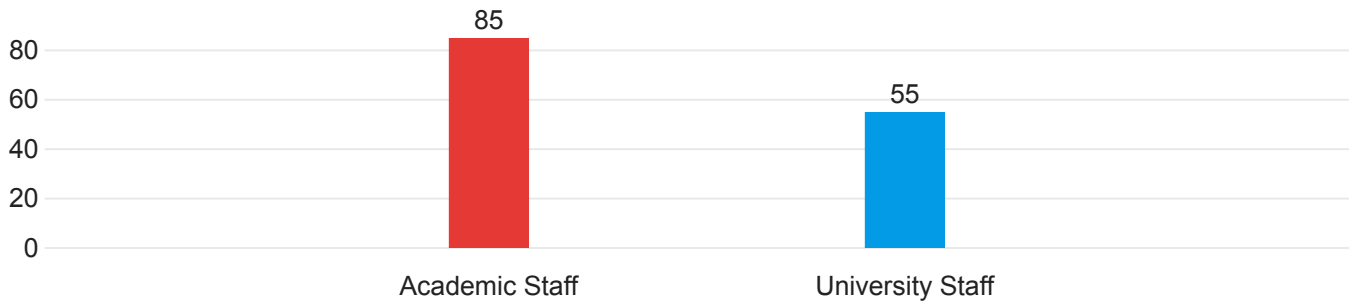
Election results pending.

**Next Meetings:** USPDC, none scheduled  
ASPDPC/USCPDC, January 2021

**Submitted by:** Teri Ternes, USPDC, Interim Chair  
October 13, 2020

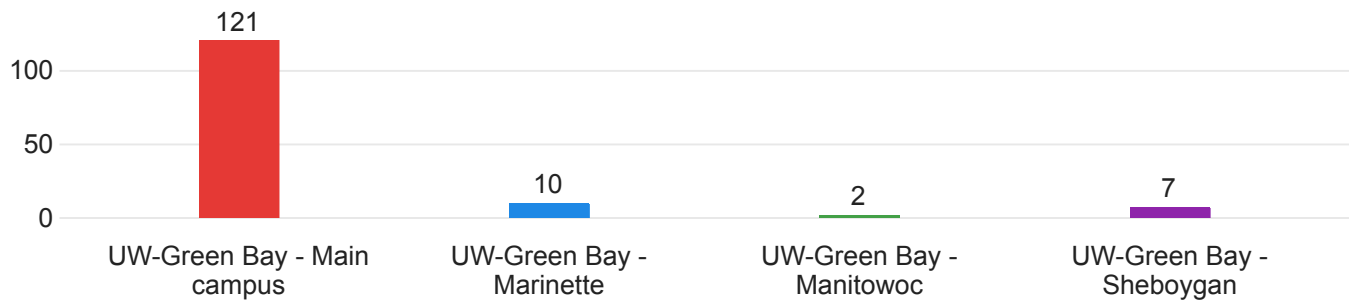
### Q2 - What is your employee classification?

140 Responses



### Q3 - What is your main campus?

140 Responses



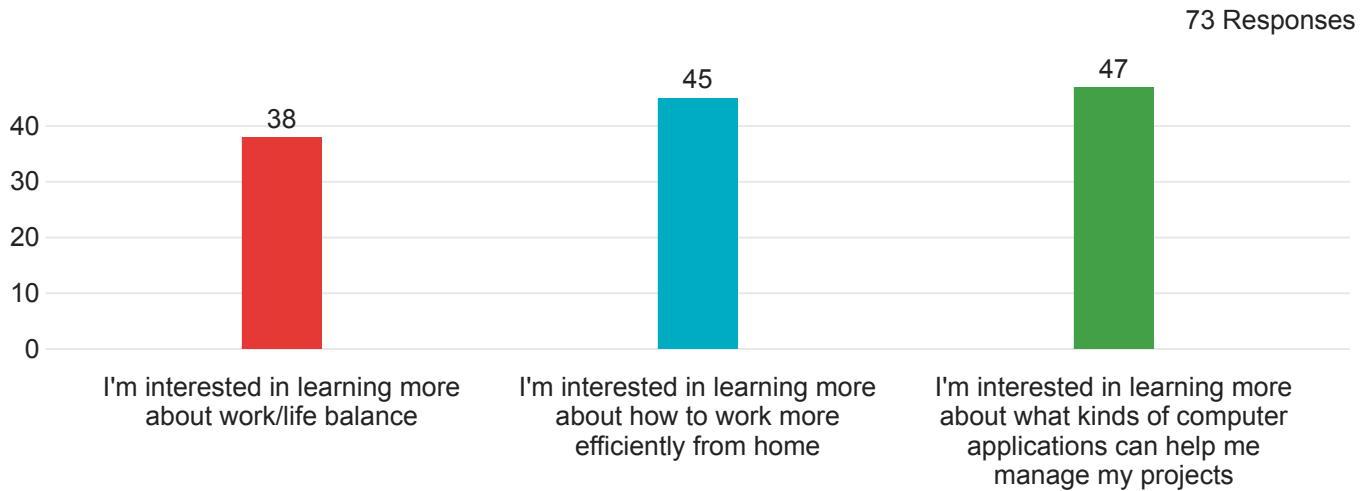
### Q5 - Programs about organizational success:

132 Responses

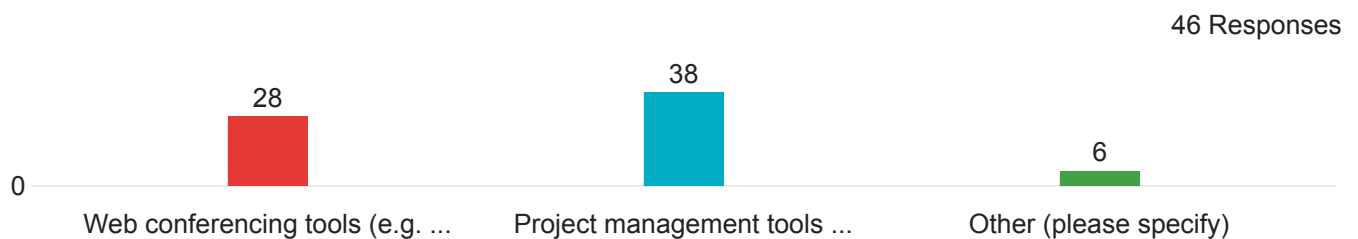


- Working remotely [19%
- Communication [15%
- Change management [15%
- Effective coaching, training, mentoring [13%
- Teambuilding [11%
- Conflict management [11%
- Performance/self-evaluations [9%
- Conducting effective meetings [7%

Q15 - In your previous response you indicated that you were interested in programming around working remotely--please expand:



Q16 - In your previous response you indicated that you were interested in learning more about computer applications that may help you manage your projects. Please indicate your interest in learning more about: - Selected Choice



Q16\_3\_TEXT - Other (please specify) - Text

Other (please specify) - Text

Adobe Create

BP Logix

Neat features of Outlook I am not aware of

Office 365 & Sharepoint

tips on how to get better internet usage

what can I do to improve internet, connect extra monitors



### Q6 - Programs about the students we serve:

129 Responses



- Inclusivity, equity, and diversity [19%]
- Non-traditional students [14%]
- Mental health issues on campus [14%]
- The digital divide (e.g. access to high speed internet is the divide) [10%]
- Accessibility and accommodations [10%]
- Neurodiversity [10%]
- Challenges due to food and/or financial insecurities [8%]
- Suicide prevention/counseling [8%]
- Veterans/military students [8%]

### Q7 - Programs about wellness:

123 Responses



- Inclusivity, equity, and diversity [16%]
- Emotional wellness (feelings, intellectual) [15%]
- Occupational wellness (career, work, environment) [15%]
- Fiscal wellness (financial, responsibility) [12%]
- Social wellness (relationships, communication) [11%]
- Nutritional wellness (food, nutrition) [11%]
- Physical wellness (physical, activity) [11%]
- Environmental wellness (air, food, water, safety) [9%]

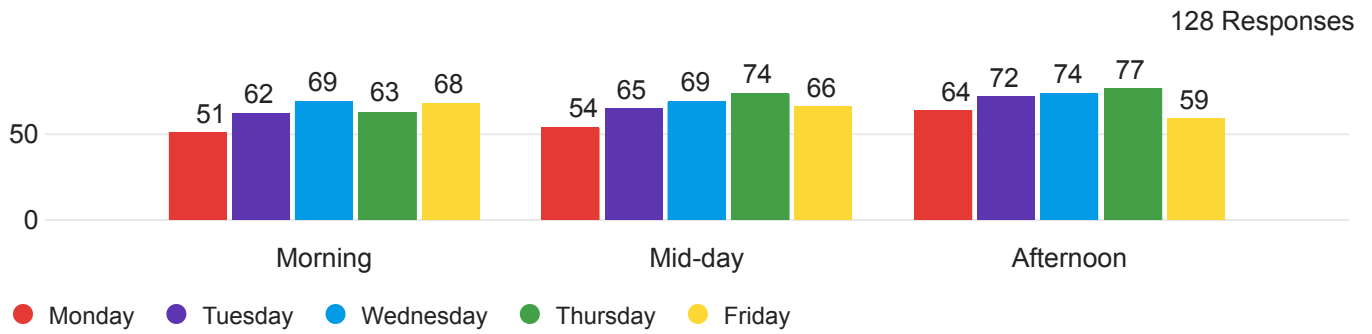
### Q8 - Other programs:

125 Responses

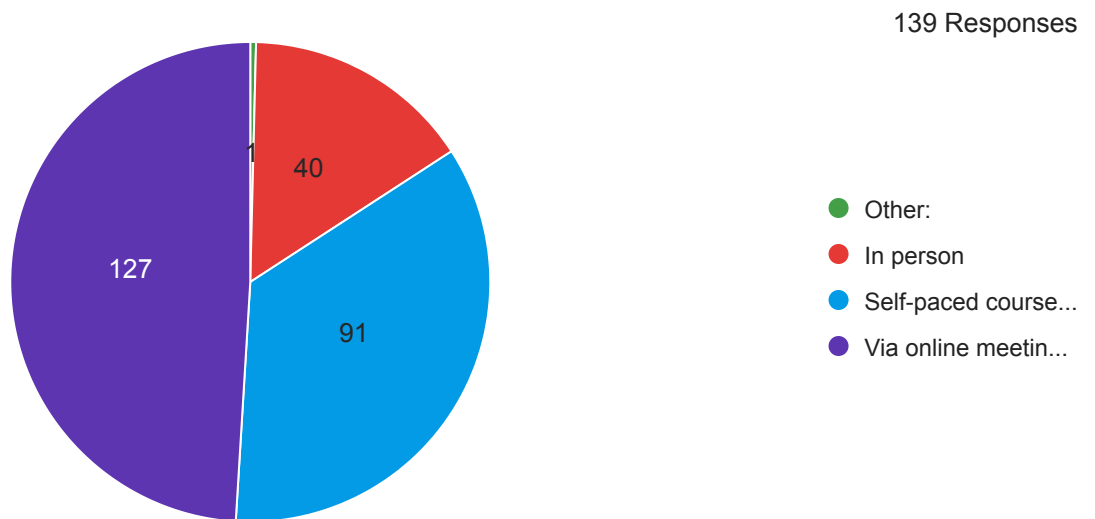


- Stress Management [17%]
- Safety & risk (CPR training, suspicious persons, etc.) [15%]
- Computing & information technology [13%]
- Creativity [12%]
- Personality inventory assessment [11%]
- Self-motivation [11%]
- Time Management [10%]
- Goal setting [10%]

### Q9\_1 - Day of the week & Time during day



### Q13 - In what modalities do you wish to participate in professional development opportunities? - Selected Choice

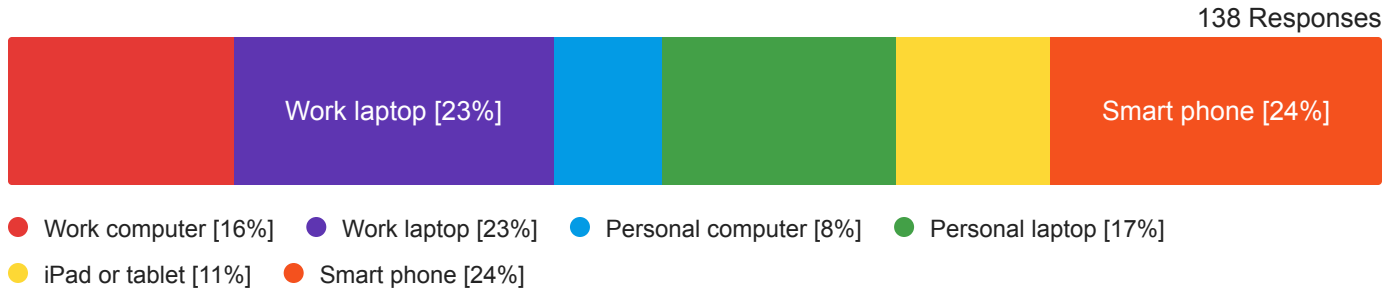


### Q13\_5\_TEXT - Other: - Text

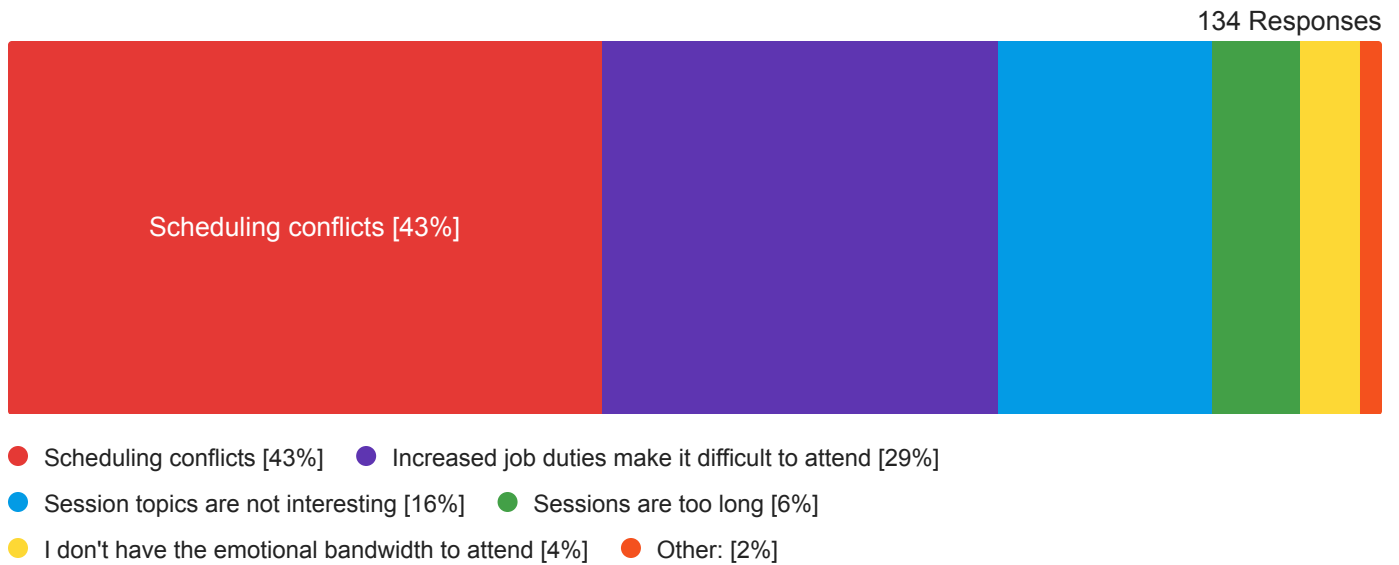
Other: - Text

would prefer in person but if that is not feasible due to the virus then I'd prefer self paced courses.

### Q14 - What kinds of devices do you have access to in order to participate in virtual professional development?



### Q12 - What keeps you from attending professional development opportunities? - Selected Choice



### Q12\_7\_TEXT - Other: - Text

Other: - Text

virtual sessions that can be recorded for viewing at other times would help immensely

Scheduling events during times when academic staff cannot attend (i.e. April and November for advisors, January or August/Sept. for Residence Life, etc.)

usually don't know about them until last minute it feels like

Scheduling events during times when academic staff cannot attend (i.e. April and November for advisors, January or August/Sept. for Residence Life, etc.)

## Q10 - Tell us about additional programming interests you have. Feel free to provide the name of a specific topic, program, or speaker. Include contact information if available.

Tell us about additional programming interests you have. Feel free to provide the name of a specific topic, program, or speaker. Include contact information if available.

WRS information about retirement

How to supervise / manage student employees

I was not able to attend the Speak Out Series over the summer. I would make the time to attend that workshop if it was available in the future.

White immunity

Generational research (For example, look at TedTalks of Jason Dorsey, etc. and his work in generational differences in the workforce)

accommodations for religious and/or cultural customs. What types of struggles do they students and staff have?

Given these stressful times, perhaps a session simply to provide a break from the chaos, a mental health break...would be worth exploring.

Since Covid will be impacting us until spring 2021 - training needs to be geared towards the stresses of financial disruption, mental health, working from home, how to work effectively remotely, building relationships and networking remotely, etc.

Tom Thibodeau: Servant Leadership

I loved the program that was presented by the university police staff. I would be interested in learning more from them. I recently attended a presentation by professor Phil Clampitt on Clear Thinking in An Age of Hype, Nonsense & Anxiety. He provided an interesting take on decision making.

I would really like to have the university host a training on how to supervise student employees.

If you're looking for professional development options without having to always put them on yourselves, you could promote Current's events. They have monthly Dine n Develop events for professional developments and it's free for all employees from the Green Bay campus (unfortunately not the others since Current is Green Bay - based) to become Current members.

White immunity

For DEI, Resmaa Menakem was mentioned multiple times during the SpeakOut sessions.

## Q11 - Tell us about a topic/presentation that we sponsored and you attended in the past, that you feel is worth repeating.

Tell us about a topic/presentation that we sponsored and you attended in the past, that you feel is worth repeating.

Always self-defense. I wish we could do more hands-on stuff (obviously once COVID is under control). Identity Theft that was presented at the University Staff Conference last year

I attended a tai chi or chi gong -- I forget which one, but it was great and would love to attend again. In person socially distance or live stream.

SpeakOut was terrific. Pivotal Pedagogy was very good.

The neurodiversity training in August.

Speak out: white immunity

I have enjoyed all the mental health trainings so far!

At last years professional development day there was a session about working with different generations--which was nice. However it felt like it was only targeted to older generations working with younger generations. I think reversed programming would be beneficial to those less than ~35.

Dana Johnson provided an LGBTQ+ training that was excellent.

I don't know if this individual is still speaking, but Chris Clark-Epstein had spoken at a state conference years ago and was engaging and humorous (relating to previous question). Someone closer to home - and former UWGB faculty member - Lucy Arendt - presented on humor during crisis, I believe.

Speak Out series

The mental health trainings put on by Kris Vespia and the Neurodiversity training this past month.

Finding out your colors. Myers Briggs

The program presented by the university police staff is definitely worth repeating. I also enjoyed the workshop from the folks at Comedy City. I would be interested in attending another workshop with them.

I enjoyed the recent mental health sessions and would have attended the neurodiversity one but had a scheduling conflict. Can recordings be shared with anyone who registered in case other commitments came up and they were no longer able to attend?

Speak our series

The SpeakOut sessions were phenomenal. More by them.

## University Staff Committee HR Update – 10/15/2020

- **Title and Total Compensation Project:** As announced last spring, the [Title & Total Compensation \(T&TC\) Project](#) implementation was delayed due to the COVID-19 pandemic. During this delay, there has been some behind-the-scenes work being done by UW System and UW-Madison. Starting in October, T&TC Project work is actively being re-engaged across the System, with a target implementation date in 2021. At the end of October, UW-Green Bay will be re-engaging our [T&TC Project Team](#) which is made up of members of the [Committee on Workload and Compensation](#), Joint Governance Reps (who serve as the T&TC advisory council for UW System), and HR/B&F staff and administration. Further updates will be shared as available.
- **COVID-19**  
New information about COVID-19 is coming out on a daily basis. Please stay tuned to your email and to the [Phoenix Forward Website](#) as well as the [UW System Coronavirus \(COVID19\) Preparedness website](#).

### Phoenix Forward Website

Review the [Phoenix Forward Website](#) to understand how we'll be operating this fall and what we need you to do to stay safe. The Phoenix Forward Website includes [frequently asked questions](#) pertaining to faculty and staff regarding UW-Green Bay's actions in response to the Coronavirus (COVID-19) emergency. Questions may also be submitted to the Question and Answer form on the right side of that [page](#).

### COVID-19 Training

All employees were expected to complete the [COVID-19 Training](#) by Wednesday, September 9, 2020. Reminder emails were sent out through Canvas early this week for employees who still have not completed the training. Please make sure to complete this training as soon as possible.

### Self-Assessment

Complete the [daily checklist](#) for each day you are on campus. If you have technical questions, problems logging in or getting access to the form, please contact help desk at (920) 465-2309 or [helpdesk@uwgb.edu](mailto:helpdesk@uwgb.edu). Questions or concerns regarding the form content or process, please contact Human Resources at (920) 465-2390 or [hr@uwgb.edu](mailto:hr@uwgb.edu).

### Reminder of Workplace Expectations:

While our University is doing exceptionally well in maintaining a safe environment for students and staff, it is important that we not become complacent with our adherence to the [COVID 19 Workplace Expectations](#). It is critically important that all faculty and staff continue to strictly follow the 3 W's; **Wear your mask / Wash your hands / Watch your distance**. In addition to following the safety guidelines, it is also necessary that all faculty and staff follow public health principles when not on a campus. For more information about employee responsibilities, please see this [blog post](#).

### K-12 Adjustments, eFMLA and Office Staffing Flexibility:

The University of Wisconsin – Green Bay and the Office of Human Resources and Workforce Diversity are committed to providing a flexible working environment to facilitate employee work/life balance during the COVID-19 pandemic while still meeting operational needs. For information about staffing options, leave resources, and flexible work arrangements, please see this [blog post](#).

### **Reporting**

The University requests that all faculty and staff who become infected, suspected or exposed-close contact or faculty and staff who receive a first-hand report of someone who is infected, suspected or exposed-close contact, complete the [COVID-19 Case Report](#).

### **Furlough**

For up-to-date information related to Furlough, please see the [Furlough Information](#) page on the HR website.

### **Employee Health & Wellness**

We recognize these unprecedented events may cause stress and other life challenges for you, your employees, and your family members and friends. We encourage employees to utilize individual providers through your health insurance program and/or UW-Green Bay's [Employee Assistance Program \(EAP\)](#), which is available for all employees, to include student employees. EAP offers services to support employee well-being and resilience in work and life, including navigating anxieties related to COVID-19.

The Office of Human Resources and Workforce Diversity is also ready to support employees and supervisors who may have questions about benefits, leave, flexible work arrangements, and other personnel-related topics. Please do not hesitate to contact us at [hr@uwgb.edu](mailto:hr@uwgb.edu) or (920) 465-2390. Please also see the [Employee Health & Wellness website](#) for more information.

- **2021 Annual Benefits Enrollment (ABE) period**

The 2021 Annual Benefits Enrollment (ABE) period is September 28, 2020 – October 23, 2020. Please make your benefits elections on your My UW portal by 4:30 pm next Friday, October 23<sup>rd</sup>.

- ABE email sent out on 9/25/20 with information about benefits changes, options, and enrollment procedures
- ABE website available at <https://www.wisconsin.edu/abe/>
- HR Connect blog posts regarding virtual one-on-one meetings with a UWGB Benefits Specialist and virtual benefits vendor sessions available at <https://blog.uwgb.edu/hr/category/payrollbenefits/>

### **New Employees:**

- **Academic Department Associate** Nursing & Health Studies: Incumbent - Blair Beyer – Kaitlin Williams was hired and will start on 10/26
- **2 Police Dispatchers** Police Department: incumbent – New – Kim Mezger and Lyndsey Agar were hired and started on 10/12

- **Financial Specialist Senior** University Union: Incumbent – Sara Chaloupka – Lea Truttman was hired and will start on 10/26

Positions Being Recruited:

- **Academic Technology Specialist (Marinette)** Client Services: Incumbent - Craig Young
- **Facilities Repair Worker - Advanced** Residence Life: Incumbent – John Zimonick
- **Academic Department Associate** Cofrin School of Business: Incumbent – Barb Swanson
- **USA 2** HB, NAS, and RSE: Incumbent – Jane Laurin
- **USPA** Residence Life: Incumbent Dan Karoliussen
- **USPA BHTP**: Incumbent Savanna Mishler
- **Custodian 1<sup>st</sup> Shift** (Library) Operations: Incumbent – Lisa Fink
- **Custodian 1<sup>st</sup> Shift** (Wood Hall) Operations: Incumbent – Lori Burmaster
- **USPA** Residence Life: Incumbent – Kelly Steffes
- **Police Officer** UW-Green Bay Police: Incumbent – Bryanne Gawlik

Recruitments Paused:

- **Security Officer 2 (2 Vacancies)** Police Department: Incumbent – New



**From:** [Ternes, Teri](#)  
**To:** [Mezger, Kim](#); [Mullen, Theresa](#)  
**Cc:** [Flenz, Julie](#)  
**Subject:** RE: Follow up from 10/15 USC meeting  
**Date:** Thursday, October 22, 2020 12:50:08 PM  
**Attachments:** [image002.png](#)

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This is great. I like the 'reiteration' for the Jan pay plan letters.

Thanks all

*Teri*

Teri Ternes  
University Services Associate II  
University Staff Committee, Interim Treasurer  
UW System University Staff Shared Governance Representative  
**web:** [www.uwgb.edu/university-staff-governance](http://www.uwgb.edu/university-staff-governance)

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**From:** Mezger, Kim  
**Sent:** Thursday, October 22, 2020 12:20 PM  
**To:** Mullen, Theresa <mullent@uwgb.edu>; Ternes, Teri <ternest@uwgb.edu>  
**Subject:** Follow up from 10/15 USC meeting

Hello!

Theresa, Julie Flenz followed up with me about the HR staff meeting, which they discussed how employees do not know their classification. Can you add this information to the minutes as a follow up?

Teri, here is the follow up on your initial concern.

*I also wanted to follow up with you on our discussion during the meeting related to employees not knowing what classification they are. Please let me know if you would like me to submit something formal to Theresa for the minutes (and perhaps Teri since she brought this up).*

*I brought this concern up during our HR Staff Meeting on Monday 10/19. During our discussion we collectively listed some documents the employee and supervisor should have on file which lists their classification. This includes their appointment letter and position description. For an academic staff employee, it is also on their contract renewal letter. Another difference is how the employee reports time and leave. University Staff have a timesheet and report time on a bi-weekly basis. Academic Staff do not submit a timesheet but they do submit a monthly leave report. Now, this isn't always the best way to determine their classification because we do have Academic Staff Hourly positions but that population is pretty small. Another difference is how and when their performance is evaluated and when. University Staff are evaluated on a calendar year basis and we have the set template we are used to. Academic Staff are on the fiscal year and both the employee and supervisor write a narrative. They do not use the template that University Staff use. To help address the concern and make people aware of their classification again, we will make sure to put their classification in the forthcoming pay plan letters for the January 2021 pay plan since we are under the assumption that that will be moving forward at this time. Should something change, our office will revisit this issue and come up with a new plan for making sure employees are aware of their classification.*

Hope you both are well! Please let me know if you have any questions!

Sincerely,

***Kim Mezger, Chair***  
***University Staff Committee***

**e-mail:** [usc@uwgb.edu](mailto:usc@uwgb.edu)

**web:** [www.uwgb.edu/univstaffgov/](http://www.uwgb.edu/univstaffgov/)

**facebook:** [www.uwgb.edu/univstaffgov/](http://www.uwgb.edu/univstaffgov/)

# University Staff Committee Statement on Adjusting Goals for Staff on Performance Reviews and Recording Time and Effort

## Overview

The COVID-19 impact on the university began during the annual performance review period for University Staff. The University Staff appreciates the deadline extension for performance review; however, some reviews were completed and submitted prior to COVID-19. The pandemic has increased the workload and/or changed the work performed. Many staff members have taken on additional responsibilities to assist with the University's shift to remote working and distance learning. For employees whose reviews were completed before the shift, the pandemic may result in many performance goals for the upcoming year being difficult, if not impossible, to meet. Staff members could end up in the position where they are working hard, but not toward the goals they – and their supervisors – set for the year. As a result, annual reviews and goal setting must account for the unprecedented disruption caused by COVID-19.

Furthermore, work and life circumstances for staff may have been altered dramatically. Most University Staff employees are now required to keep a log of hours worked, recording how much time is being spent on each task. For some it is burdensome, with supervisors requiring details down to the minute. For others, a simple list suffices. Many budgets are frozen, which leaves staff without the financial resources they need for their work. Others do not have access to the human resources (i.e. student workers) and physical resources (i.e. equipment) they require. Moreover, the added labor of caretaking for family members, adjusting to an alternative work schedule, setting up a home office, and the overall stress of working and living during a global pandemic could undermine the ability of staff to complete their goals set before this crisis began.

## Recommendations

For these reasons, we would like to advise supervisors and campus units to take the following steps when considering work performance and goals for annual reviews, and in requiring documentation for time and effort during the work day.

- 1) All goals not completed before December 31, 2020 should transfer to next year's (2020-21) review cycle, unless the supervisor and employee agree that the situation surrounding the pandemic has obviated the goal.
- 2) Supervisors should encourage employees to discuss with them any new tasks they undertook, outline any temporary increases in workload/responsibilities, and summarize how priorities shifted in light of the COVID-19 pandemic on their self-evaluations.
- 3) Supervisors should consider new tasks that employees undertook, temporary increases in workload/responsibilities, and how priorities shifted quickly as a result of the COVID-19 pandemic in their assessments of the employee's performance.
- 4) Supervisors and employees should not merely add new goals onto the carryover goals from 2019-2020. Rather, employees and supervisors should work together so that employees have roughly the same amount of goals for 2020-21 as they did for 2019-2020.

5) Recording time and effort worked is useful, especially where there may be distractions in some peoples' new work environments. However, record keeping should not need to be so detailed that every minute must be recorded. As professionals, University Staff have a commitment both to the University and to our positions in the work that needs to be accomplished.

This recommendation and proposed action is endorsed:



Sheryl Van Gruensven  
Interim Chancellor

Michael Alexander  
Provost & Vice Chancellor for  
Academic Affairs

Kim Mezger  
2019-2020 University Staff Chair  
Office Manager, Disability Services

Statement approved as to form by UW-Green Bay Human Resources



Approved by: Chancellor's Cabinet

Date: \_\_\_\_\_

\_\_\_\_\_  
Michael Alexander, Chancellor

## University of Wisconsin-Green Bay Need-Based Grant Aid and Merit-Based Scholarship Award Policy

GB 21-19-1

### **The Mission of the University of Wisconsin System:**

The mission of this System is to develop human resources, to discover and disseminate knowledge, to extend knowledge and its application beyond the boundaries of its campuses, and to serve and stimulate society by developing in students heightened intellectual, cultural, and humane sensitivities; scientific, professional, and technological expertise; and a sense of value and purpose. Inherent in this mission are methods of instruction, research, extended education, and public service designed to educate people and improve the human condition. Basic to every purpose of the System is the search for truth.

### **Preamble**

1. To assure equitable treatment for all students enrolled at UW-Green Bay
2. To assure compliance with the laws of the Federal Government of the United States of America and the State of Wisconsin
3. To assure donor intent is followed for all mandatory criteria
4. To assure donors and advancement staff are not engaged in the award/selection process as interested parties and operate in accordance with the spirit of Internal Revenue Service policies
5. To foster an efficient process that minimizes the total staff time University personnel commit to the award process
6. To modernize the future funding of need-based grant aid and merit-based scholarships through retooled Advancement efforts

### **Need-Based Grant Aid and Merit-Based Scholarship Policy Statement**

Public universities have a public purpose, including serving students from a wide variety of backgrounds. The University of Wisconsin-Green Bay's role as an open access university demands the grant aid and scholarship program be administered with fairness and equity in alignment with our mission to advance the public purpose. All admitted students met the admissions criteria established by the University and, as a result, may apply for grant aid or



scholarship awards. This commitment is central to our mission and identity to improve the lives of students and society-at-large.

Student recruitment and retention are key components of the university's academic strategic plan. University scholarships and grant aid are leveraged to insure maximum utilization of funds to meet the university's enrollment goals to attract and retain an academically talented student body and remove financial barriers to attendance in order to maintain access for qualified students.

In order to accomplish these goals, a high level of coordination in awarding of grant aid and scholarships is required. University procedures require clarity to enhance the overall coordination of scholarship awards in particular with the individual colleges, departments, and personnel when and if scholarship criteria require input from sources outside the Financial Aid Office. Additionally, centralized coordination of institutional awards will allow the institution to complement federal and state grant aid.

### **Departmental Scope of Responsibilities**

**Academic and Other Awarding Units** – Academic units or departments may be consulted by the Financial Aid Office to support award selection when donor-specified criteria warrants such involvement. It is the responsibility of the awarding unit to recommend students compliant with donor stipulations and respond/communicate with the Financial Aid Office by stated deadlines. All award recommendations shall be based on donor-specified criteria only. The Selection Committee shall not add additional criteria to the award process or interject additional subjective material into granting the award. Selection committees must document in writing the rationale for making awards when subjective criteria is employed in the evaluation process if required by donor gift agreements.

**Admissions** – Admissions, through the leadership of the Provost, is responsible for communicating university enrollment strategies and goals to individuals or groups who are part of the awarding process. Admissions will also assist in promotion of scholarship application processes and programs.

**Advancement** – Advancement officers, in conjunction with University leaders, solicit grant aid and scholarship gifts from alumni and friends and are the key connecting point for most donor relationships. Grant aid and scholarship funds are managed by the UW-Green Bay Foundation until such time funds are transferred to the University for posting in student accounts by the Bursar. Advancement notifies the Chancellor, Provost, and Financial Aid Office of available award amounts and donor specified criteria. Advancement provides



donor reports and hosts scholarship events for donors to meet scholarship recipients. At no time are University officials to share student contact information with donors. At no time are University officials, staff, or faculty to meet with donors and grant aid or scholarship recipients without specific authorization from the Advancement Office.

- Advancement staff are prohibited from serving in any capacity relating to grant aid or scholarship award selection.
- The Internal Revenue Service allows donor's tax deductibility for grant aid and scholarship contributions. As a result, the IRS prohibits donors or their designees from controlling any portion of the selection process which protects the gift from being treated as a tuition payment for a specific, identified student. Donors of grant aid and scholarship funds are prohibited from serving in any capacity relating to awards deriving from their gifts. This includes participation on selection committees and serving in advisory capacities for selection purposes.

Financial Aid Office – The Financial Aid Office has responsibility to maintain compliance with federal, state, and university policies relating to the awarding of grants and scholarships, to maintain associated systems and procedures required to facilitate same, and to provide access to relevant and necessary information to assist in the collaborative awarding of scholarships when necessary. The Financial Aid Office is ultimately responsible for awarding all grant aid and scholarships to students meeting the eligibility criteria. Financial Aid officials are obligated to follow donor-specified criteria in grant aid and scholarship gift agreements. The Financial Aid Office is also responsible for communicating all financial aid, including scholarship awards, to students (not faculty or award selection committees). The Financial Aid Office may seek input from other University staff for the purpose of selecting recipients meeting donor-specified criteria. The Financial Aid Office is solely responsible for awarding all need-based scholarships guided by the Title IV of the Higher Education Act of 1965, which is based on need alone. The Financial Aid Office assures that student names will not be used in the evaluation of scholarships but shall be designated by student identification numbers whenever possible.

## **Procedures**

1. Determination of student financial need.
  - a. The Financial Aid Office is the University authority for determining financial need consistent with and guided by criteria established by the Department of Education. As such, Financial Aid will coordinate, determine eligibility, and make the selection of recipients for all need-based grant aid and merit scholarships that have a need-based component.



2. Interpretation of endowment agreements and donor language.
  - a. Agreements at time of implementation: Advancement, in consultation with Financial Aid, will be the coordinating department for questions regarding the interpretation of grant aid and scholarship language in existing donor agreements with respect to awarding procedures. The Financial Aid Office will manage the overall award process and report the outcomes of award decisions to students. Both Offices shall adhere to donor wishes within legal guidelines.
  - b. Agreements entered post implementation: In full recognition that donors give in accordance with their passions, flexibility in awarding funds is critical to meeting the open access mission of the University. In order to meet the strategic goals of the University, Advancement shall consult directly with the Provost or College Deans to match fund-raising objectives with institutional goals.
3. Approval of general, unrestricted awards: The Provost shall provide direction to the Financial Aid Office regarding procedures for awards made from general University funds.
4. Centralized disbursement of scholarships and grant aid: University Policy, in compliance with federal student aid regulations, requires that all grant aid and scholarships to students be allocated through the Financial Aid Office. The Financial Aid Office is solely responsible for communicating with students and in providing students with information about impact on financial aid. This requirement is in place to foster communications and enhance effectiveness of our resources. The Financial Aid Office will maintain one database of grant aid and scholarship data to facilitate this enhanced communication.
5. Timely awarding of scholarship/grant funds: In order to have maximum impact on enrollment, October 15th is set as the target date to begin awarding to incoming freshmen students. Awards for continuing students and new transfer students should begin on February 15th for the upcoming academic year. Mid-year awards are possible but should be coordinated in advance as they often replace other aid sources and require unanticipated adjustments.
6. After screening for meeting donor criteria, an applicant pool materializes of equally eligible candidates. Unless otherwise required by donor agreement, random selection methods (lottery) shall be implemented to select recipients in the spirit of equity when the applicant pool is larger than the number of grant aid awards or scholarships available. A lottery is a process in which winners are selected by a random drawing once a pool of equally eligible candidates materializes. Lotteries are useful in decision-making situations, especially for the allocation of scarce (limited) need-based grant aid



or merit scholarships when all eligible candidates deserve an equal chance of being selected.

7. All privately funded need-based grant aid and scholarships must be tracked by the Awards Management Software.

### **Permitted and Prohibited Scholarship Criteria**

UW-Green Bay has a strong commitment to open access for all qualified students. For this reason, selection criteria related to age (traditional/non-traditional), race, ethnicity, gender/sex, citizenship, or national origin are not acceptable, as they do not provide for the most inclusive initial applicant pool. In order to achieve efficiency in administration and assure sufficient applicant pools exist for need-based aid and merit-based scholarships, donors funding new awards may select from the following criteria as determined at the time of application:

- Financial need as determined by the Financial Aid Office guided by the criteria in the Title IV of the Higher Education Act of 1965
- Academic level including Grade Point Average or generally accepted test scores
- Academic level pertaining to class year – freshman, sophomore, junior, or senior, graduate student, etc.
- Domicile of student as determined by County of high school attended
- Intended or declared college major course of study
- Renewability of scholarship for subsequent semesters/years
- Athlete
- Veteran status
- Travel program/study abroad/international student

Staff of the UW-Green Bay Advancement department shall advise interested donors on permissible and prohibited selection criteria for inclusion into gift agreements. Donors shall be encouraged to limit award criteria to maximize the size of applicant pools and provide flexibility and efficiency in the selection process. Donors are also strongly encouraged to make awards renewable for up to three additional years.

Under specific circumstances, a donor may wish to establish an annual or endowed grant aid or scholarship fund, which frequently carries the name of the donor or family member in the title. The minimum gift level for funding an endowed fund is \$25,000. The minimum award level for annual awards is \$2,500 and must be renewable by the individual for up to three additional years for a total gift commitment of \$10,000. Gifts of all other amounts shall be directed to the general grant aid and scholarship funds.