

NEW SUPERVISOR ORIENTATION

Manage Smart

Office of Human Resources and Strategic Talent Management

March 27, 2025

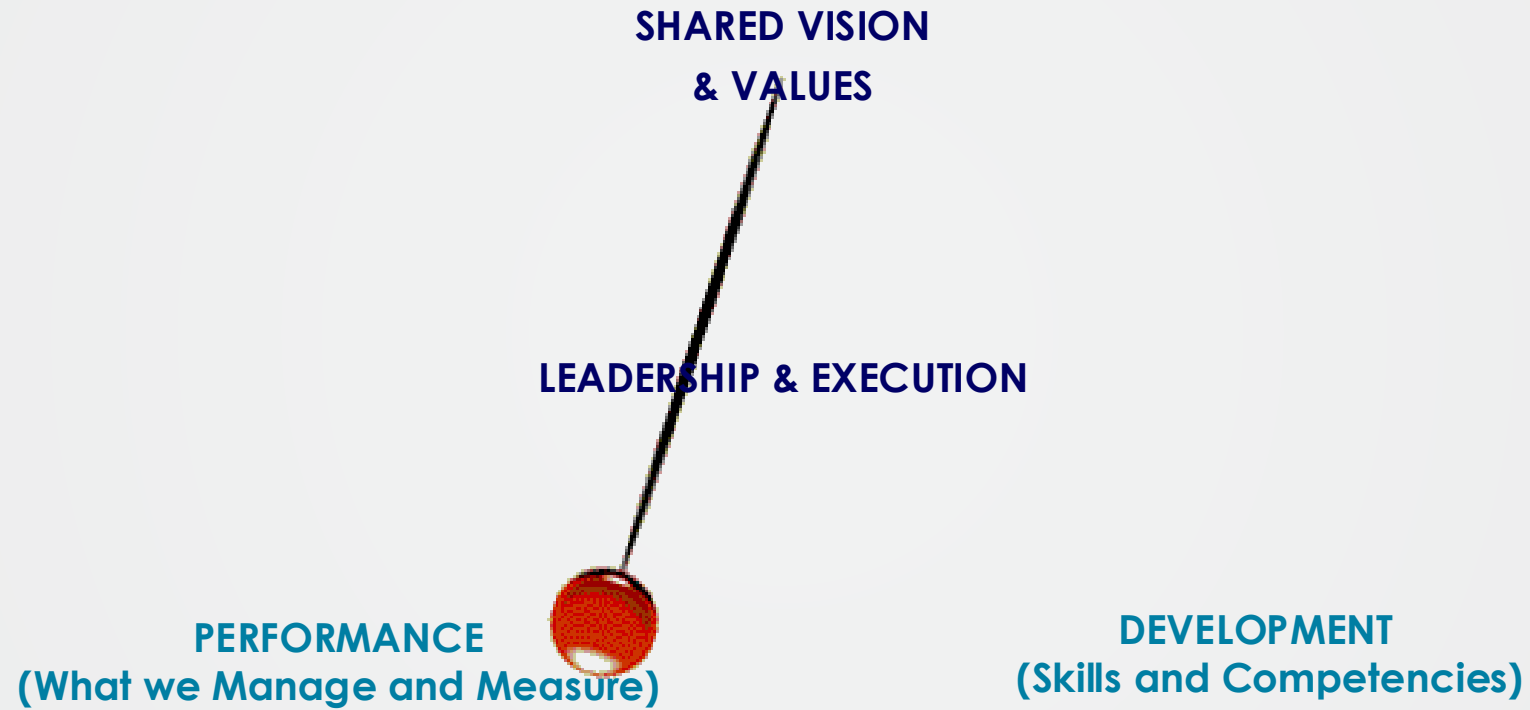
Welcome Back!



ELITE Professional Development

- **Employee Professional Development – non pedagogical**
 - Management, and Leadership
 - Culture, Conflict, and Communications
 - Customer Service and Coaching

Professional Development Focus



ELITE Professional Development

Developing Yourself and Your Team

1. Staff Super Tuesdays
2. Pathway Programs
3. Cohort Programs
4. Professional Week
5. Staff Summer PD
6. Licensed Training
7. On-Demand Services

Learning Pathway Programs

- On-going and one-off classes in a specific area
- From one-hour workshops to half-day and whole day intensive classes
- Valuable opportunity to meet meaningfully with MC peers to network, share and learn together
- New subjects and specializations based on MC organizational, team and individual needs.
- Managerial and Front-line worker focus
- Both Staff and Faculty relevant

PATHWAY Programs

- Management and Leadership
- Total Customer Service
- Communications and Work
- Change Management – coaching and change
- Effective Committees
- Equity and Inclusion
- Management – hybrid of classes from existing PWs
- Self-Directed learning - LinkedIn

COHORT PROGRAMS

Programs begin in fall and early spring

- Programs are F2F and virtual
- Cohorts are closed group classes to deepen knowledge and skills in a specific area – realize theory into practice
- Certificate of completion and permanent record at MC
- Cohort alumni support available in the form of follow-up workshops

FY25 Cohort Programs



Professional Week and Summer PD

■ Professional Week

- Each new semester begins with Professional Week and ELITE provides a range of learning and development offerings targeting faculty needs and interests
- One-hour workshops and open to all

■ Staff Summer PD

- Each summer ELITE provides a range of professional learning and development offerings with subjects geared toward staff interests
- One-hour workshops, offered twice and delivered via Zoom



- Every second Tuesday of each month offers as many PD opportunities as possible
- Creates a regular time where employees and managers can more easily plan to attend PD
- The offerings range from 30 minute speed sessions, to one hour workshops, and three hour intensive trainings
- All programs are available to view and register on Workday in one easy to navigate place – ELITE Learning Catalogue

Licensed Training

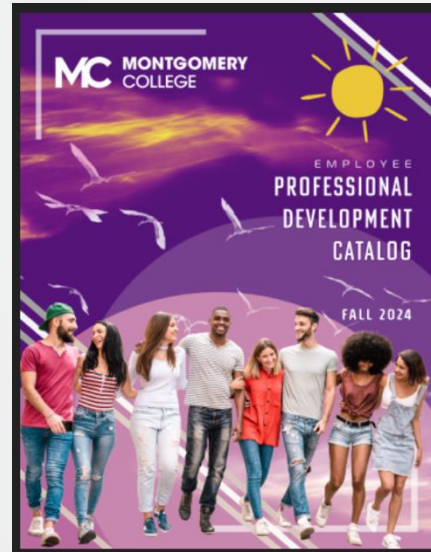
- Crucial Conversations
- Getting Things Done
- Crucial Accountability
- Expedition Leadership Coaching program
- Psychometrics, Change Management and Team Diagnostics



ELITE HUB

Explore and Register for ELITE classes and services

- <https://pressbooks.montgomerycollege.edu/pdcatalogfall2024/>



Activity

- Challenge: *How can I support employees in managing their career?*
 - Can you give performance feedback?
 - Feedback at Work: individuals, teams, and culture - Workday

Choose top 3 needs

- **I am a manager, and my team needs development in...**
 - Communications
 - Intercultural relations and working with diverse groups
 - Conflict management
 - Processes and time management
 - Customer Service
 - Collaboration
 - Health and Wellness, Work Integration
 - Other

Identify Needs in Rank Order

- **I am a Manager and I need development in..**
 - Leadership
 - Cultural Awareness and Emotional Intelligence
 - Task management
 - Relationship management, Trust building, Feedback
 - Communications and persuasion
 - Coaching and Developing others
 - Managing conflict and difficult employees
 - Teams and innovation

Impact of Training on Your Unit

- Supporting staff professional development and leveraging MC Values of Excellence, Diversity, Innovation
- Increased morale, motivation and effectiveness
- Individual Professional Development Plan
- **Career path planning**
- Performance Review Impact
- Effective Individual feedback
- Observing and Measuring Change

Please register using the QR code for a
surprise at end. 🎉



Employee Engagement & Labor Relations (EELR)

Meet the EELR Team



Carol
Kliever

Director,
Employee
Engagement
and Labor
Relations



Theresa
Julien

HR Employee
& Labor
Relations
Manager



Grecia
Coughlin

HR Specialist II
Employee
Engagement &
Labor Relations
Specialist

EELR email address is:

EmployeeRelations@montgomerycollege.edu

Employee Engagement & Labor Relations (EELR)

Meet the EELR Team



Carla
Ammerman

Human
Resources
Manager



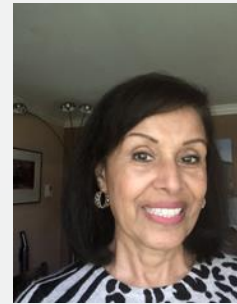
Elaine
Doong

Human
Resource
Specialist II



Teresa
Natera

Human
Resources
Leave Specialist



Rowena
D'Souza

Risk Management
HIPPA Privacy

Three Unions at MC



American Association
of University
Professors

- Represents the Full-time faculty union
- President: Tito Baca



American Federation of
State, County, and
Municipal Employees.
Council 3, Local 2380

- Represents the Bargaining Staff
- President: Lori Ulrich



Service Employees
International Union, Local
500

- Represents the Part-time Faculty Union.
- Director: Victoria Baldassano

Policies and Procedures

- **Policies** at Montgomery College are adopted by the Board of Trustees.
- **Procedures** are issued by the College President.
- Our official policies and procedures are segmented into seven chapters which can be found on our MC website.

- Chapter I - Board of Trustees
- Chapter II - Organization
- Chapter III - Personnel
- Chapter IV - Student Affairs
- Chapter V - Educational Program
- Chapter VI - Fiscal and Administrative Affairs
- Chapter VII - Facilities

- Policy and procedure modifications.

Managing in a Union Environment

- The CBA is a legally binding document that governs how the College interacts with unionized employees.
- CBA's allow some employees to be designated as "shop stewards," people who are available on shift to advise and assist their fellow union members.
- While supervisors may disagree with the shop stewards on specific issues, it is important to always deal honestly and fairly with them. Treat others as you want to be treated.
- In a unionized setting, an employee has the right to request the presence of a union (shop) steward whenever an employee is subject to an investigatory interview, which might lead to discipline. The shop steward does not have the right to be disruptive or argue on behalf of the employee.
- Grievances filed should demonstrate a violation of an Article or Section of the CBA.
- Follow the Grievance process and timeline based on the CBA.

Best Practices for Effective Employee Relations

- Address concerns and issues in a timely fashion as they arise.
- Actively listen (recognize any potential biases).
- Use an even professional tone.
- Practice empathy.
- Focus on the behaviors/situation being discussed and separate them from the individual.
- Know when to involve the HRIC or EELR.
- **Document** and recap the discussion with the employee(s) and any goals/outcomes/next steps discussed.
- Meet with your employees regularly to touch base.



Creating a Positive Feedback Environment

1 Identify Growth Opportunities

Analyze employee performance to pinpoint areas for improvement. Focus on potential rather than shortcomings.

2 Provide Constructive Feedback

Offer specific, actionable feedback. Frame it as an opportunity for growth and development.

3 Develop Improvement Plans

Collaborate with employees to create personalized performance improvement plans. Offer support and resources for success.

4 Follow-up and Celebrate Progress

Regularly check in on employee progress. Recognize and celebrate improvements, no

Supporting Employees through Challenges



Empathetic Listening

Practice active listening when employees share challenges. Show genuine concern and understanding.



Leave Management

Guide employees through sick leave and FMLA options. Ensure they understand their rights and benefits.



Accommodations

Proactively offer reasonable accommodations. Work with HRSTM to implement necessary changes.



Regular Check-ins

Stay in touch with employees on leave. Offer support and resources to ease their return.



Managing Performance & Conduct

Understand the Situation

- 1 Listen to the employee's perspective. Gather all relevant information before making any decisions.

Apply Fair Discipline

- 2 Ensure discipline aligns with CBA. Be consistent and transparent in your approach.

Offer Support

- 3 Provide resources to help the employee improve. Show genuine concern for their success.

Monitor Progress

- 4 Regularly check in and offer feedback. Adjust the plan as needed to support improvement.



Performance Improvement Plan (PIP)

The purpose of the Performance Improvement Plan (PIP) is to address items that have not been successfully addressed through conversations about performance expectations.

**The Job Aid link for PIP is on the MC website under -
Performance Improvement Plans- Workday Job Aid for Managers**

Disciplinary Process

The disciplinary process should reflect the nature and gravity of the offense. This progressive process includes:

- verbal reprimand
- written reprimand
- suspension
- termination

The Job Aid link for Disciplinary Action is on the MC website under- Disciplinary Action Workday Job Aid for Managers

Non-bargaining Employees

- 34002 Disciplinary Action and Suspension

The general purpose of disciplinary action is to correct improper performance or behavior, to provide clear notification when improvement is needed, and to hold employees accountable for their impact on the workplace. Employees whose behavior, actions or inactions are unacceptable are subject to disciplinary action.

Grievance

- ***What is a grievance for a non-bargaining employee?***

A grievance is an alleged violation of policy and/or procedures. (See P&P 34101)

- ***What is a grievance for a bargaining employee?***

A grievance is an alleged violation of the CBA provision by Management.

Ways We Can Help

- The College's Employee Engagement and Labor Relations (EELR) team is here to support healthy and productive work relationships that promote the mission of the College.
- We provide guidance and strategies to prevent, de-escalate & resolve workplace conflicts. Clear and open channels of communication between employees and managers are basic principles of sound employee relations for managers and supervisors.
- On occasion, employees and managers differ in their perceptions regarding answers to important questions or employment policies. When that happens, guidelines and procedures have been established to provide employees and managers with tools to help evaluate and resolve the problem.

Internal Investigations

- **Violation of Policy or Procedure**

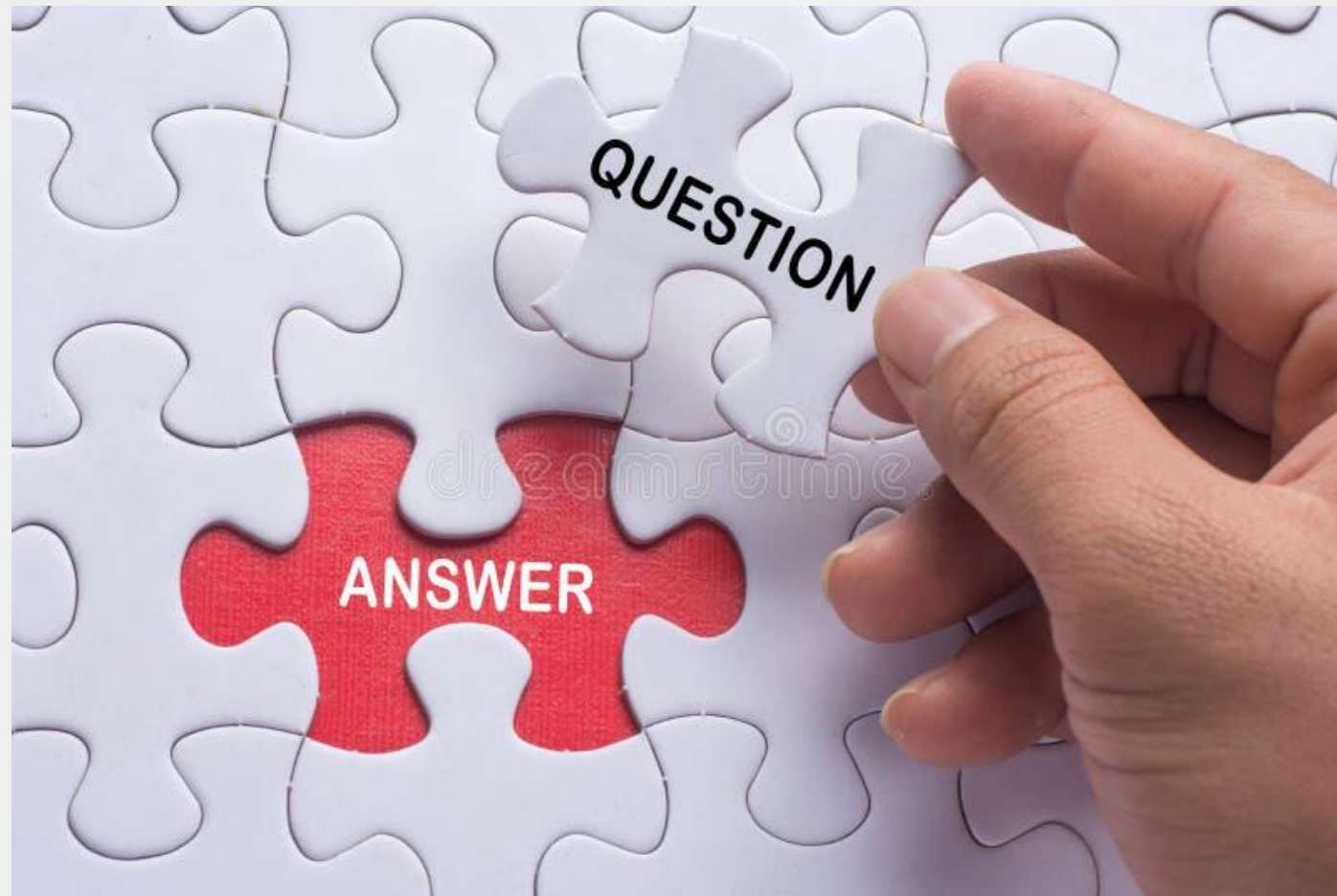
Some of the items that EELR typically investigates are: Title VI, Title VII, and Title IX allegations. In addition to those, we also investigate fraud/waste/abuse of resources, harassment, and retaliation.

- **Ways to report issues/violations**

- **Supervisor**
- **HRIC**
- **Public Safety**
- **Ethics Point-(via phone or online) The case will be assigned to be addressed**
- **EELR**

Last chance to register using the QR code to win prizes and bragging rights.







Back at **11:15** a.m.

Procurement 101

Understanding the Procurement Process

Cherree Adams
Procurement & Contracts Manager
Office of Business Services
Procurement
March 27, 2024

Procurement Website:

<https://www.montgomerycollege.edu/procure>

Procurement 101

This overview will cover the following topics:

- Our Mission
- Your Role in the Procurement Process
- The Procurement Process for Buying Goods and Services
- Ordering Methods/Thresholds
- Other Important Information
- Q&A

Mission

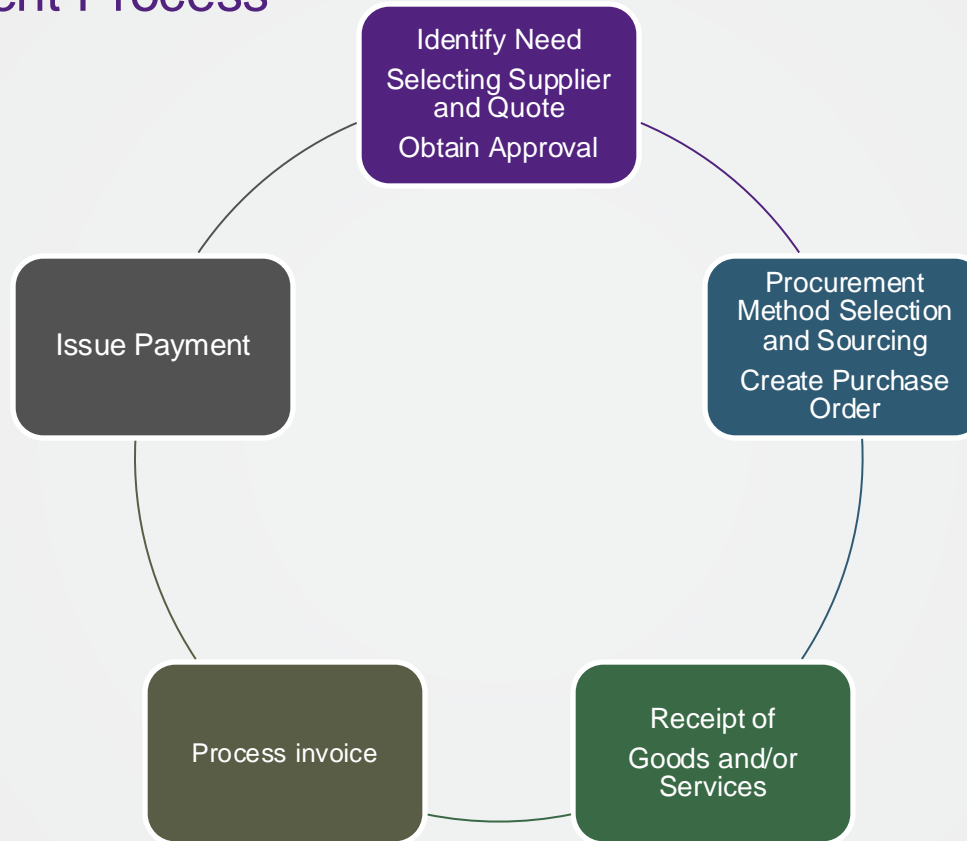
The Office of Procurement is a service unit within the Office of Business Services. Our office strives to add value, quality, and satisfaction in the delivery of goods and services in accordance with the Board of Trustees policies and procedures, local laws, and regulations.



Your Role in the Procurement Process

1. **Adhere to all applicable federal, state, local laws and regulations and college Board of Trustees Policies and Procedures.** Your needs can be better met when we collaborate together to execute the procurement procedures. We are here to serve you, and we need your help and cooperation to do so.
2. **Buy responsibly.** Taxpayers and students count on us to demonstrate fiscal integrity.
3. **Use approved purchasing methods.** Before committing the College to pay for supplies, services, and equipment.
4. **Plan ahead** to avoid last-minute purchases and rush orders, which generally cost more. Industry lead times vary by what you are buying. Keep Procurement advised of your future needs (especially large-dollar value projects).
5. **Let us know when you have questions or concerns.** We will be happy to meet with you as you plan your requirements.

Procurement Process



Ordering Methods

- **Purchase Requisition–Workday Self Service (Electronic Requisition):** *It is an **INTERNAL** document to initiate request to procurement for goods or services you need. In Workday, requisitions will be used to initiate the buying process. Be sure to have all related supporting documentation uploaded in Workday as an attachment. For a new vendor, obtain a vendor w-9 and create a supplier, refer to the Create Supplier Request job aid. If you have questions, please contact the Procurement Office. procure@montgomerycollege.edu*
- **Purchase Order (PO):** A legally binding contract committing College funds. It is prepared and executed by the Purchasing Agent and sent to the vendor to buy requested goods and services.
- **Purchasing Card (P-Card):** A VISA credit card issued by M&T Bank, which has been contracted by the College to provide a flexible, convenient method for authorized College requestors to buy small-dollar value goods according to established guidelines.

Thresholds

College procurements use one or more of the following methods:

1. Open Market Procurement (contracts and purchases up to \$10,000)
2. Small Procurement (contracts and purchases between \$10,001 and \$25,000) shall be procured competitively with at least three valid price quotations from three different vendors.
3. Competitive Sealed Solicitation (over \$25,000) Bid
4. Contract award \$250,000 above requires approval by the College board.
5. Special Procurements (sole source request, emergency, PTOA) Sole Source purchases between \$10,001 and \$99,999 require approval by the Director of Procurement, \$100,000 and above require College board approval.
6. Purchasing Card (Pcard) \$5000 credit limit (single transaction limit is \$4999) Purchasing cards cannot be used to purchase IT related items, services or furniture. For additional information refer to “Purchasing Card Users Guide”.
 - Section 5.2 Allowable Purchases for College-related business
 - Section 5.3 Prohibited Purchases

TEAM 4 & 6		
Yu Zhu, CPPO, C.P.M., Purchasing Manager yu.zhu@montgomerycollege.edu Phone: 240.567.5284	Maria Da Conceicao, C.P.M., Purchasing Agent II Maria.DaConceicao@montgomerycollege.edu Phone: 240.567.3230	George Varghese, Purchasing Agent II george.varghese@montgomerycollege.edu Phone: 240.567.5295
A rchitectural/Engineering Services B uilding Renovation/Major Repairs C onstruction Services C onsulting Services & Training (F acilities-related) E levator Modernization/Repair/Maintenance F ire System Monitoring, Testing, Inspection & Repairs F uel (Heating oil, Gasoline & Diesel) G oose Management H azardous Waste Disposal P arking Management P aving Services P est Control P roperty Lease/Rental Space T rash/Refuse Removal U tilities & Energy Related Services W ater Treatment Services	A rt Supplies (MCPS orders) and Equipment A sset Management Services (Facilities) A thletic Supplies/Equipment/PE/Maintenance C ourse/Admission-related Testing Material/Services E vents and Event related Contracts & Tickets F ood/Catering (Other food services non-Metz) G ases/Glass/Industrial Oxygen G ift Cards H onoraria P rofessional Development Training/Consulting P romotional Items/ Awards/Plaques S ponsorships T heatre Arts Supplies/Contracts & related-Services U niforms/Apparel V ehicles, Auto Parts/Supplies, & Services W DCE- Contract related-Services	B uilding Materials/Services/Supplies D ocument Shredding Services E lectrical Supplies/Services F acilities-related equipment and tools F acility Services (Painting, Upholstery & Others) F urniture H eating/Air Conditioning Supplies/Services J anitorial Supplies/Equipment/Services L andscaping Equipment/ Supplies/Services L ocksmith Services & Locks M oving/Mobile Trailers/Storage Services P lumbing Supplies/Services S ignage S now Removal
TEAM 5		
Cherree Adams, CMRP, Purchasing Manager cherree.adams@montgomerycollege.edu Phone: 240.567.5285	Lisa Dyer, CPCP, Purchasing Agent I lisa.dyer@montgomerycollege.edu Phone: 240.567.5241	
A mazon Business Account Administrator A udiovisual Supplies/Equipment/Maintenance A uxiliary Enterprise C able & Broadband Services C ommunication (Cabling (Data & Voice), Pagers, Radios, Telephones)	B ooks, DVDs/Tickets/Periodicals/Subscriptions B ottled Water Service C ompliance-related Training C onference/Registration I T Asset Disposal I T Computer Hardware & Peripherals	



MONTGOMERY COLLEGE

<p>Copier Equipment Leases/Print Management Services Financial Services (Actuarial, Auditing, Banking) HRSTM (Human Resources- related Services) Interpreting/Translation Services IT Contracts & Services/Enterprise Systems Library Supplies/Contracts/Services Mail Equipment Supplies/Postal Services Medical/Radiologic/ Supplies & Equipment Office Supplies & Equipment/Maintenance P-Card Administration Records Management Safety & Security Camera Equipment & Services Scientific Lab Supplies/Equipment/Maintenance Temporary Staffing Services</p>	<p>IT-related Training/Certifications MCTV (Montgomery College Television) Memberships Musical Instruments/Equipment/Maintenance Photographic Supplies/Equipment and Services Safety and Emergency Management Equipment & Services</p>	
<p>William Valentin, Purchasing Specialist william.valentin@montgomerycollege.edu Phone: 240.567.5391</p>	<p>Chiquita Manago-Haywood, Purchasing Agent II chiquita.manago@montgomerycollege.edu Phone: 240.567.5289</p>	
<ul style="list-style-type: none"> ▪ Amazn Business Account Services ▪ eMaryland Marketplace Advantage (eMMA) Site Administrator ▪ Purchasing/Corporate Card Services ▪ Web site Management 	<p>Advertising Services Business Cards & Stationery (Letterhead & Envelopes) Commencement & Related Services Courier & Delivery Services Food Services (Metz Culinary Management) Hood System Inspection for Kitchens and Laboratories IT Software (Licensing/Subscriptions) Kitchen Supplies/Equipment/Maintenance Marketing Services Portable Restroom Rentals Printing, Design, & Layout (Printed Materials) related Services Reservations (Hotels) Individual & Group Transportation Services Travel Services for Athletics</p>	

Create Supplier Invoice (Direct Payment)

Non-Procurement function. Convenient payment method for subscriptions, memberships and other eligible transactions up to \$10,000. These requests routed to Accounts Payable directly and transactions are paid directly from general ledger accounts through the Accounts Payable.

Create supplier invoice request can be used for:

- Subscriptions and membership (up to one year with no auto-renewal)
- Sponsorship and honoraria up to \$10,000
- Delivered goods with total amount less than \$10,000 and each unit price less than \$4,999
- Completed services up to \$10,000

Supporting documents, such as executed contract, invoice, shipping documents etc. must be uploaded in workday when create supplier invoice request. Be sure to email Account Payable with the Supplier Invoice Number once completed.

Supplier Invoice Request cannot be used:

- Recurring purchase of goods and services
- Goods, where the unit price is greater than \$4,999
- Any grant purchases regardless of the dollar amount
- Any purchase with vendor's terms and conditions subject to the legal review and approval.

Collegewide Contracts

- **Office products and supplies - Rudolph's Office and Computer Supply** (contract valid through 6/30/2025).
- **College business cards & envelopes and stationery - Envelopes and Printed Products, Inc.** (contract valid through 7/18/2028)
- **Furniture – Duron, Inc.** Every request for furniture (except for ADA accommodation) must be reviewed and approved by the Central Facilities Office prior to purchase. (Contract valid thru 12/31/2024).
- **Food/Catering - Metz Culinary Management.** Any on campus food/catering services not using Metz must be approved by Director of Auxiliary services in advance.

Amazon Business Account

Montgomery College has created a centralized Amazon Business account that will streamline the way we do business with Amazon. Work-related Amazon spending should be conducted through an official Montgomery College Amazon Business account.

- Through Amazon Business, you will have immediate access to:
- Free standard shipping(5-8 business days) on eligible orders over \$25
- Business pricing and quantity discounts on a growing selection of items
- Enhanced search and browse functionality
- Access to a specialized Customer Service team for business customers only

Everything else you know and love about shopping on Amazon.com will remain the same. If you are not already registered, please email: procure@montgomerycollege.edu to request an invitation to join the Montgomery College Amazon Business Account.

Central Receiving & Surplus Property

Office Hours: 7:30 a.m. to 4 p.m.

Central Receiving & Surplus Property under Office of Facilities is the primary recipient of mail and packages for goods. When necessary, Procurement will be modifying the Ship To address in the final PO.

Address: 7602 Standish Place, Rockville, MD 20855

Phone: 240-567-5282

Contact: James Fowlkes, Warehouse Supervisor

Office of Procurement Contact Information

Central Services Bldg.

9221 Corporate Blvd

Rockville, MD 20850

➤ **Website:** <https://info.montgomerycollege.edu/offices/procurement/index.html>

➤ **Email Address:** Procure@montgomerycollege.edu

➤ **Telephone Number:** 240 567-5292

➤ **Fax Number:** 240 567-6397



Break Time!



Back at **12:45** p.m.

Budget Overview for Supervisors

Office of Business Services

Linda Hickey
Budget Director

Presentation Overview

- Budget definition & purpose
- Annual budget development process
- Budgets at Montgomery College
- Operating fund revenue sources
- Operating fund expenditures
- Unit budgets

Budget Definition & Purpose

- What is a budget?
 - A plan for an organization's outgoing expenses and incoming revenues for a specific period of time.
- What is the purpose of a budget at the College?
 - Plan, track, and control spending.
The purpose is to ensure that spending follows a plan, stays within preset limits, and does not exceed available funds.
 - Support funding requests.
The purpose is to justify funding requests by showing how funds are used.

Annual Budget Development Process

- **July to October – Budget Development**
- November to January – Senior Leadership and Board Review
- January – Budget Sent to County Executive and Council
- March – County Executive Releases Budget
- April/May – County Council Discussion
- May – County Council Adopts Budget
- June – Board of Trustee Adopts Budget

Budgets at Montgomery College

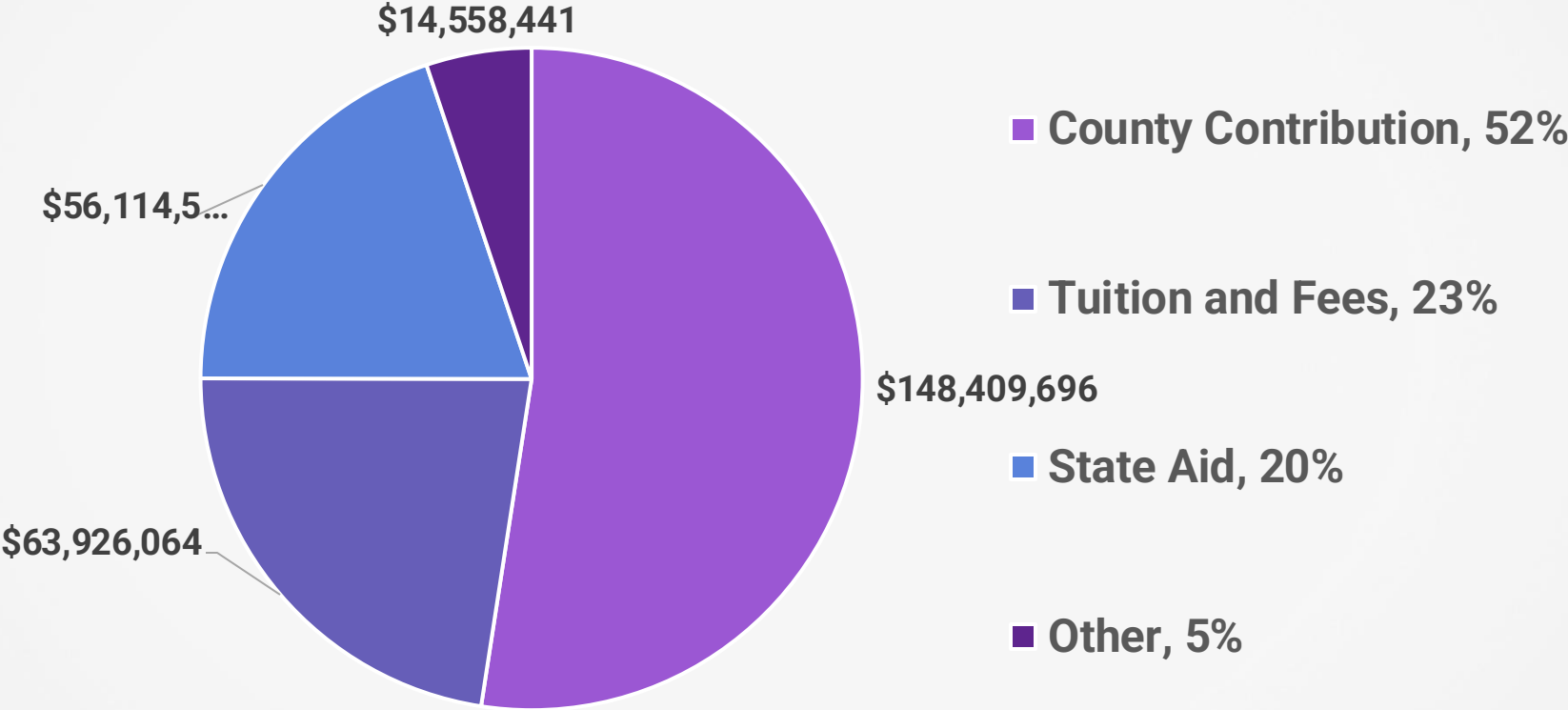
- Operating Fund aka Current Fund*
- Emergency Plant Maintenance and Repair Fund*
- County Grant Fund*
- Workforce Development and Continuing Education Fund
- Auxiliary Enterprises Fund
- Transportation and Major Facilities Reserve Fund⁺
- Federal, State, and Private Grants
- MC 50th Endowment Fund
- MC Cable TV
- Capital Fund

*Tax supported by County Residents

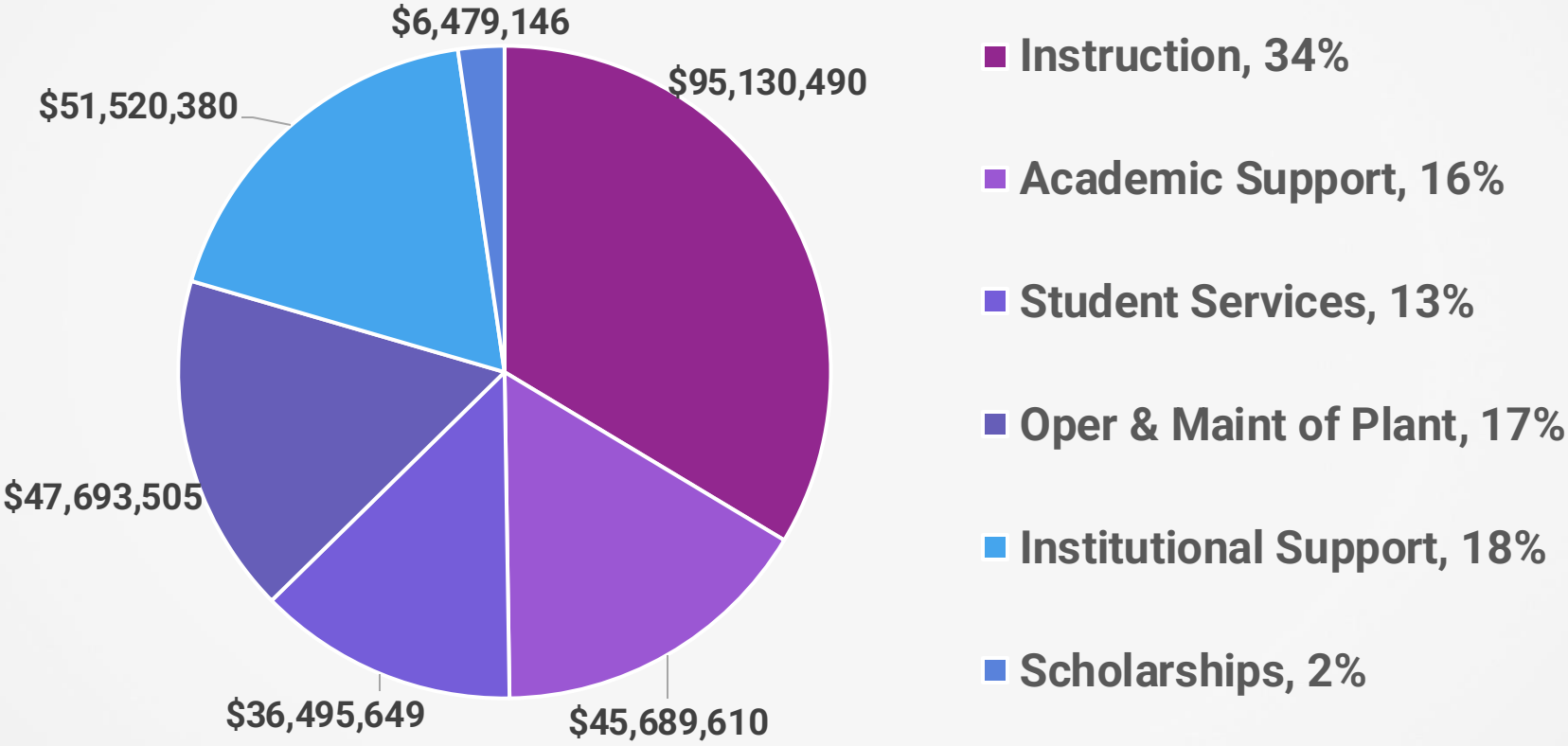
⁺Supported through student fee

Operating Fund Revenue Sources

FY25 Budget

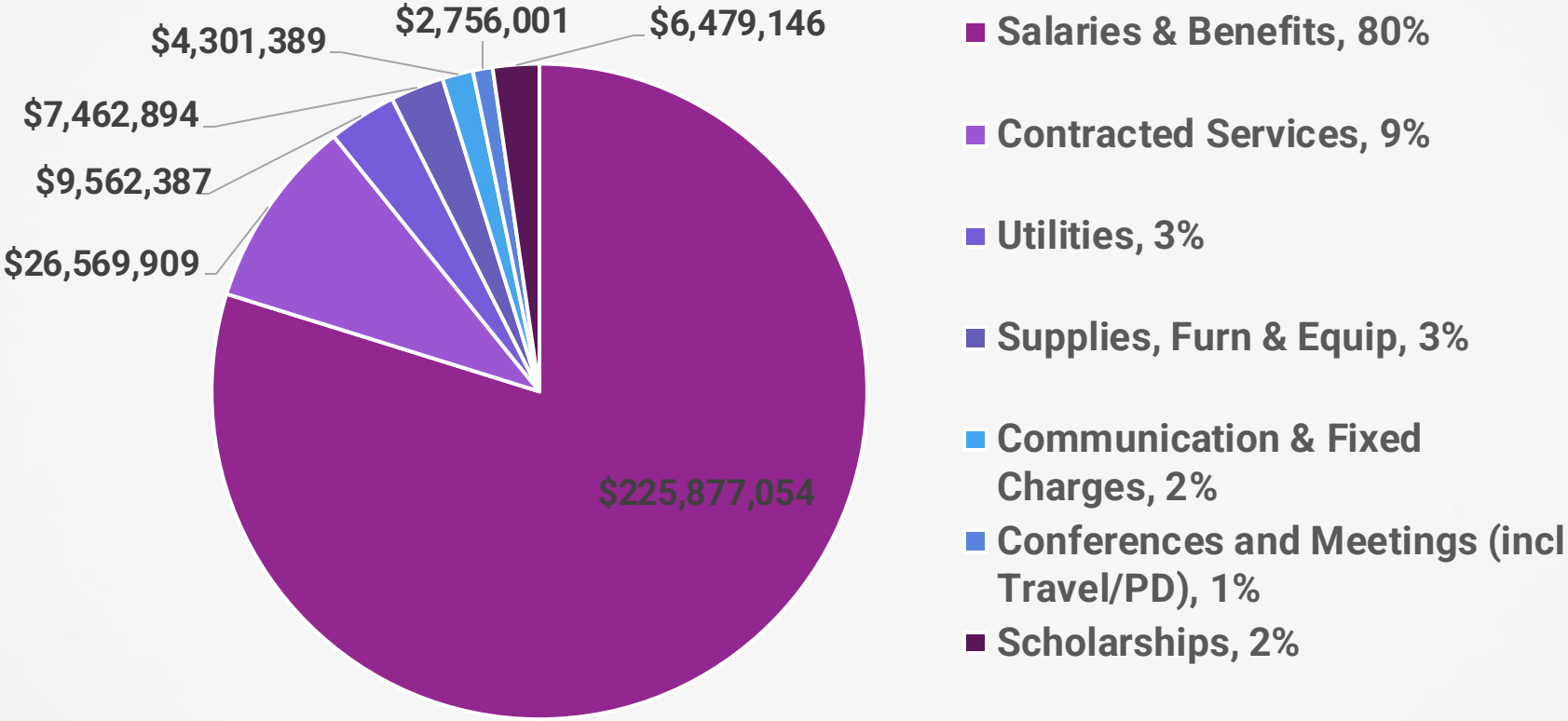


Operating Fund Expenditures by Function FY25 Budget



Operating Fund Expenditures by Object

FY25 Budget



Unit Budgets

- Determined by a FOAP account structure
 - F is for Fund
 - O is for Organization – (Cost Center Workday)
 - A is for Account – (In Workday funds are budgeted at ledger account)
 - P is for Program – (aka function)
- When is it necessary to do a Movement of Fund (MOF)
 - Select salary accounts to non-salary accounts or vice versa
 - MOF can only occur within like funds

Unit Budgets (cont.)

- Responsibilities in managing an unit budget
 - Responsible for managing the transactions
 - Recording the transaction in the correct account & program
 - Following procurement guidelines
 - Responsible for ensuring that accounts are not overspent
 - Exception: Budget position accounts (5001,5101 and 5301) and instructional salary accounts (5102, 5130)
 - Non salary accounts may have situations where accounts are overspent and others are underspent just so in total not salary accounts are not overspent.



Managing Life in the Workplace



Managing Life in the Workplace

- ADA Accommodations/ Ergonomic Assessments
- Time off -Advanced Sick time off/STD/LTD/FML/LWOP
- Drug and Alcohol Abuse Prevention Policy/Faculty Staff Assistance Program (FSAP)
- Workers' Compensation
- HIPAA Privacy
- Supervisory challenges since the pandemic.

Remote Work Request

- What is the criteria for approving the request?
- What is my role as the supervisor?
- Is performance a factor?
- Reporting leave during remote work.
- How do I manage a remote worker?

Managing Life in the Workplace

Americans with Disabilities Act (ADA)

- Who is covered?
- What is a reasonable accommodation?
- How do you request an accommodation?
- Why do you need to request an accommodation?
- What questions can a supervisor ask an employee related to the disability?
- Privacy and confidentiality of health information.
- ADA Coordinator for Faculty and Staff – Rowena D’Souza



Managing Life in the Workplace

LEAVE TYPES

- Short Term Disability Leave (STD)
- Long Term Disability Leave (LTD)
- Advanced Sick Time Off
- Leave Without Pay (not FML)

Managing Life in the Workplace

- **Family and Medical Leave (FML)**
- Who is eligible – 1 year and 1,250 hours
- What is the duration – 12 weeks – 480 hours
- Intermittent use of FML
- Military FML – 26 weeks
- FML runs concurrently with sick time off
- Use of sick time off for 5 or more consecutive days
- FML runs concurrently with STD

Managing Life in the Workplace

Bonding Leave

- Mothers and fathers are eligible
- Must be taken by baby's 1st birthday
- May not be taken on intermittent basis without employer's consent
- Fathers may use up to 12 weeks of sick leave for bonding with the baby.
- Annual time off may also be used during this time if approved by the supervisor.

Mental Health-Friendly Workplace

- Role of the Supervisor
- Awareness
- Accommodations
- Assistance
- Access

Managing Life in the Workplace

MC CARES

Care, Advise, Respond, Engage, Support

This is a voluntary, CONFIDENTIAL assistance program designed to help employees and their families with life issues & situations, including: marital concerns, stress, family pressures, financial difficulties, bereavement, elder care, pet sitting, vacation planning.

- Available 24 hours a day/7 days a week
- NO cost to employees or family members
- Up to 6 free sessions per issue

Managing Life in the Workplace

Drug and Alcohol Abuse Prevention Policy

31005CP

- Prohibits possession, use or distribution of unlawful drugs and alcohol on college property.
- Disciplinary action for violating the policy.
- No open containers of alcohol in your vehicle.



Managing Life in the Workplace

Standards of Conduct for Employees

- Report to work “Fit for Duty”
- Able to work safely
- Promptly disclose restrictions to supervisor
- Do not disclose underlying medical condition to supervisor
- HIPAA Privacy Official at the College – Rowena D’Souza

Managing Life in the Workplace

Worker's Compensation Program

- CorVel Corporation Services
- Report incident to Security
- First visit is always covered
- Provide clinic with documentation
- Reimbursement at 66 2/3% or 100% of pay
- Use of leave while out of work due to a work injury/illness

Managing Life in the Workplace

Contact Information

- Rowena D'Souza – 240-567-5370/ADA/Risk Management
- Teresa Natera – 240-567-3137/Leave and Ergonomic Specialist



Managing For Optimal Performance

Human Resources Internal Consultants

Lisa Evans Student Affairs/ WDIP

Takoma Park/Silver Spring Campus

Leslie Jones Fiscal Services/ Presidents Office

Germantown Campus

Open Academic Affairs

Rockville Campus

Scot Brown OD Outreach Manager

Managing For Optimal Performance

Learning Outcomes

- How to address performance issues
- Become familiar with the Performance Management cycle
- Resources for success

Addressing Performance Issues

- Guidance depends on bargaining or non-bargaining status of employee
- Each contract is different
- If not addressed in a collective bargaining agreements then follow the policies and procedures (for example supervisors are non-bargaining).

What Is Coaching?

A developmental activity in which a supervisor works one-on-one with someone in a coaching role to improve current job performance and enhance their capabilities for future roles or challenges.

Coaching vs. Counseling

- Coaching: is a function that helps employees **improve** their performance on the job by providing feedback.
- Coaching is a two-part process involving observation of employee performance and conversation focusing on job performance between the coach and the employee.

Why Coaching?

- The purpose of coaching is *to evaluate work performance on an ongoing basis* and encourage optimum work performance.
- Coaching provides ***regular feedback and support*** about employee's job performance and helps you to understand exactly what your employees need to know.
- It prevents small problems turning into big ones that may require much more attention later.

Performance Improvement Plan (PIP)

The purpose of the Performance Improvement Plan (PIP) is to define serious areas of concern and/or gaps in an employee's work performance, reiterate the supervisors expectations, and allow the employee an opportunity to demonstrate improvement. MC strives to encourage successful employees and foster strong working relationships through regular feedback and open lines of communication.

PIP Basics

- Discuss the employee and performance deficiencies with your HRIC or EELR representative.
- Enter the PIP into Workday.
- Schedule a time to meet with your employee.
- Monitor and assess progress.
- Complete the PIP and determine the next steps.

AFSCME

Their collective bargaining agreement identifies non-disciplinary actions that a supervisor can use to improve performance or correct violations of Montgomery College policy which include counseling, performance improvement plans, mandatory training, conflict resolution or other remedial actions.

Non-Disciplinary Actions

- Counseling
- Performance Improvement Plans
- Mandatory Training
- Other Remedial Action
- Conflict Resolution

Counseling

- Counseling should be used to afford an employee an early opportunity to address and correct a matter of concern that may lead to disciplinary action.
- Counseling is not discipline and a Union representative need not be present when counseling is provided.
- Follow up meeting with an email to the employee summarizing conversations and performance expectations.

Counseling Basics

- Be open, direct, informal
- Include details, provide specific examples of the problem
- Give the employee opportunity to share his/her side
- Work together to find a solution
- Schedule a time to evaluate progress
- Document your meeting for your own file

Mandatory Training

- Workday Learning
 - Internal content provided by ELITE
 - LinkedIn Learning
- External training through EAP or departmental funding

Conflict Resolution

- An employee may ask to engage in dialogue, coaching, mediated discussions, or other forms of conflict resolution in an effort to address concerns regarding the employee's performance.
- Resources available to assist through EELR or your HRIC.

Other Remedial Action

- Any other non-disciplinary actions other than those that are appropriate to correct an employee's inappropriate behavior or as a means of causing an improvement in performance before or after engaging in progressive discipline.

Managing For Optimal Performance

Policy 36001 Performance Evaluation and Employee Development

- Written evaluations are completed to meet the following general objectives of performance evaluation and employee development:
 - Keep employees informed of current job expectations, identify and document changes in responsibilities.
 - Identify performance objectives to increase the effectiveness and efficiency of the individual's job performance.

Managing For Optimal Performance

Performance Management @ MC

Types of evaluations used at MC

- 6 month evaluation (HRICs involved-support)

With regular coaching meetings

- 12 month evaluation

Facilitate regular coaching meetings – even when performance is strong.

Managing For Optimal Performance

Six Month Performance Evaluation

- One time evaluation after first 6 months on the job
- What is covered?
 - Performance expectations
 - Review of goals that were set during first week of employment
 - Recognition for what is going well
 - Recommended areas of improvement – gaps or weaknesses
 - Review of required training completion

Annual Evaluations

Components:

- Employee Self-Evaluation
- Supervisors Evaluation of Employee
- Establishment of Goals
- Ratings
 - Exceptional Performance, Exceeds Performance, Fully Meets Performance, Needs Improvement, Unsatisfactory Performance

2025 Goals Schedule

- **September/October 2024**- Enter Goals into Workday
- **January 2025**- Review of FY2025 goals
- **April 2025** - Review of FY2025 goals
- **June 2025** – Final review of goals

Note: Goals entered by employees are routed to the supervisor/manager for approval

Annual Evaluation

Suggested Guidelines:

May 27, 2025 – Evaluations launched by HRSTM

June 30, 2025 - Employee completes self-evaluation

July 30, 2025 - Supervisor completes employee's evaluation

August 1, 2025 - Supervisor schedule meetings with employee to review evaluation

August 21, 2025 – Employee and supervisor acknowledge evaluation and submit
(Deadline for completion)

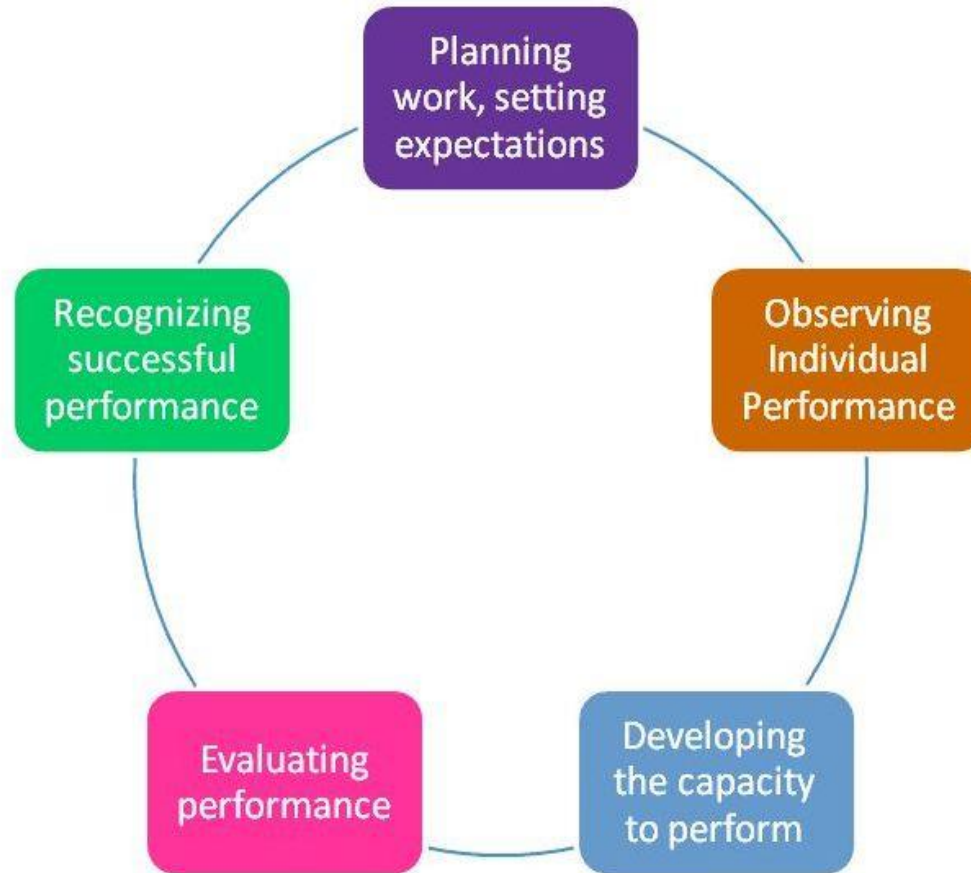
Online Resources

- Workday Training
 - General Navigation Video
 - Talent and Performance Job Aids
- Utilizing the HRSTM Performance
 - Rating Categories
 - Competencies

2025 Annual Performance Evaluations

- There will be timely communications about the 2025 Performance Evaluation cycle.
- We offer training for all supervisory staff of the evaluation process.
- Your HRIC will assist in answering your questions you may have on this topic.

Performance Management Cycle



Performance Goals

Performance goals are short-term objectives that an employee is expected to achieve within a set period of time. These goals are usually attached to specific job positions and are determined after considering the tasks and duties an employee is required to perform in that position. Performance goals are often a subset of and add up to overall College goals. They let employees know what is expected from their position.

Developing Performance Goals

- Strategic plan
- Cascade from MC leadership to your unit's management
- Support the work of the college

Developing your Performance Goals

- Talk with your supervisor about your goals
- Consider MC's goals and those of your unit to connect with the mission and strategy of MC
- Work collaboratively with your supervisor to begin drafting your goals
- Confirm agreement and enter your goals in Workday

Professional Development Goals

Professional development goals are objectives you can set for yourself to help further your career. These might include taking steps to learn relevant skills, expand your professional network, or find more satisfaction at work.

Professional Development Goals

- Give you an idea of your vision for your future
- Help you enhance existing workplace skills
- Improve productivity
- Encourage continual growth and lifelong learning
- Helps you to take advantage of the benefits MC offers

Examples of Professional Development Goals

- Learn a new skill
- Expand your education
- Build your soft skills
- Develop leadership skills

Entering Goals in Workday

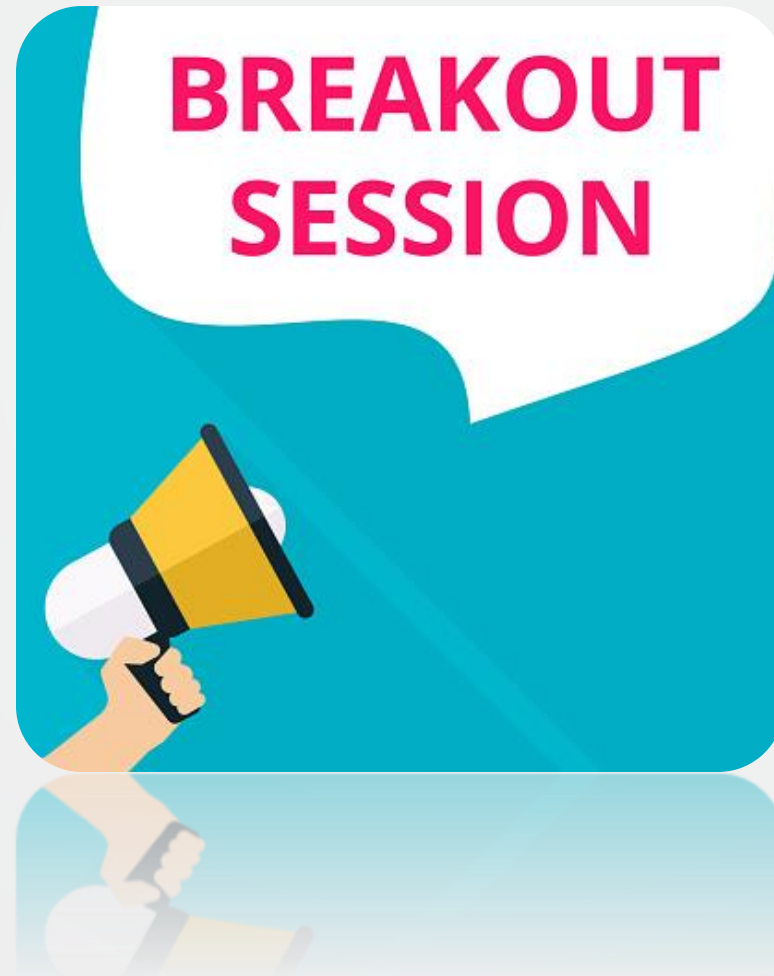
Find Info:

- Search for Workday
- Workday@MC Resource Site
- Talent and Performance Management
- Manage Goals Job Aid

Additional Trainings

- The course **Goal Setting** is available through Workday/ Internal.
- The course **Successful Goal Setting** is available through Workday/LinkedIn Learning.
- **Defining and Achieving Professional Goals** is available through Workday/LinkedIn Learning.

Managing For Optimal Performance



Real Life Situations

Instructions:

- Read each scenario.
- Discuss ways to address the situation.
- Determine which “tools” may be most effective for each situation.

Managing for Optimal Performance



Thank you!



Back at **3:45** p.m.

Managing Ethically and with Integrity

Maria Adams

Compliance and Ethics Specialist

Office of Compliance, Risk, and Ethics

Maria.Adams@montgomerycollege.edu

Managing Ethically and with Integrity

Learning Outcomes

- Understand ethical culture and how ethical leaders positively impact organizational culture.
- Know how to report concerns and wrongdoing at Montgomery College.
- Recognize how ethical expectations support the work experience.

Managing Ethically and with Integrity



Managing Ethically and with Integrity

Organizational and Ethical Culture



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Tone At The Top

A term used to define management's leadership and commitment towards openness, honesty, integrity, and ethical behavior.

Tone At The Top Affects

Mood In The Middle

Buzz At The Bottom



Fostering an Ethical Culture at MC

The Office of Compliance, Risk, and Ethics is responsible for overseeing, monitoring, and coordinating compliance matters for the College. The Office also is committed to promoting an environment where the seven ethical expectations—Accountability, Civility and Collegiality, Compliance, Fairness, Honesty, Respect, and Stewardship—are upheld by every employee.

Managing Ethically and with Integrity

Mission, Vision, and Values

Values Statement

*At our core, we believe in welcoming all students and all employees into a community that emphasizes belonging. We believe in giving every individual what they need to succeed (**Equity and Inclusion**). We believe in conducting our teaching and service duties with distinction (**Excellence**) in an ethical and trustworthy manner (**Integrity**). We are dedicated to being a transformational institution seeking social justice and are continuously updating and improving all our learning environments, the curriculum, and student services (**Innovation**) to meet the changing needs of our community (**Adaptability**). We make decisions about our operations in a way that respects and sustains the environment (**Sustainability**). We conduct ourselves with civility, courtesy, and professionalism in all our interactions (**Respect**).*

<https://www.montgomerycollege.edu/about-mc/mission-values.html>



Fostering Student Success at MC

Student success is inherent to the work and efforts of the Office of Compliance, Risk, and Ethics. Montgomery College students are empowered through awareness and engagement about critical compliance-related initiatives. Woven into this work is a commitment to advancing an ethical and equitable College culture that fosters inclusion, social justice, and support for students to thrive during their journey at MC.

Managing Ethically and with Integrity

Student Success Policy and Procedure – 41000

“II. C. Student success is enabled when faculty and staff are committed to:

1. providing a positive, welcoming climate that reflects an ethical and caring college community;” (41000CP)

Managing Ethically and with Integrity

Code of Ethics and Employee Conduct and Ethical Role Models

Managing Ethically and with Integrity

Code of Ethics and Employee Conduct Policy and Procedure 31000



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Ethical Expectations



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Which of the Ethical Expectations would you be most interested in sharing information about with your team?

Accountability
Civility and Collegiality
Compliance
Fairness
Honesty
Respect
Stewardship

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Thinking Critically As An Ethical Role Model

- Does this violate any law, policy, or standard of conduct?
- What are the risks and benefits, both short and long term?
- What are the positive and negative consequences of each option?

Managing Ethically and with Integrity

Supervisors as Ethical Role Models

- Employees are encouraged to come to you with concerns.
- As supervisors, you are responsible to hear employee's concerns and address them.
- **Resources are available for guidance for areas of uncertainty or to confirm you are providing the right guidance.**

Managing Ethically and with Integrity

Supervisors as Ethical Role Models

- It is better to ask than proceed without certainty. When in doubt, check it out.
- Employees are protected against retaliation.

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Reporting Concerns and Wrongdoing

Managing Ethically and with Integrity

Reporting Concerns and Wrongdoing

- Employees are expected to report suspected wrongdoing.
- Employees are encouraged to report suspected wrongdoing to their supervisor as a first contact.
- Supervisors are to address the concerns and escalate as appropriate. Resources are available for guidance for areas of uncertainty or to confirm you are providing the right guidance.
- Employees also can report anonymously to the College's confidential reporting line, EthicsPoint.

Managing Ethically and with Integrity

EthicsPoint Confidential Reporting Line

844-572-2198

www.montgomerycollege.ethicspoint.com

Montgomery College Confidential Reporting Line

MC
MONTGOMERY
COLLEGE

Anonymous and confidential reporting line
hosted by **EthicsPoint**

Call
844-572-2198
or visit
www.montgomerycollege.ethicspoint.com

Not sure if you have an ethical conflict to report? Questions about the types of ethical concerns employees may report?

**Contact the Office of Compliance,
Risk, and Ethics**

240-567-7396
ethics@montgomerycollege.edu
montgomerycollege.edu/ethics

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Roadmap for Employees to Address Concerns



ROADMAP FOR EMPLOYEES TO ADDRESS CONCERNS

Do you have a concern you feel needs to be addressed? This document provides a roadmap regarding where you can go for assistance and resolution.

Contact your supervisor or manager with your concern. Supervisors and managers are your first line of communication.

Ombuds—Guidance at any time.

- Confidential, neutral, independent, and informal resource with whom you can discuss any and all workplace issues
- Offers discussion and coaching on workplace issue resolution, strategies, and options
- Refers employees to other MC resources

Ombuds@montgomerycollege.edu

EthicsPoint Reporting Line

- Submit concerns anonymously and confidentially
- Managed by the Office of Compliance, Risk, and Ethics

montgomerycollege.ethicspoint.com
844-572-2198

Intellectual Property Concerns

- Contact the Dean of the relevant academic department

Additional Resources

- Governance Councils
- Labor Unions—AAUP, SEIU, or AFSCME

Student Concerns

Visit the Student Complaint Resolution webpage for policies and procedures about reporting your concerns.

If contacting your supervisor/manager is not possible or appropriate, or you wish to obtain further assistance, then contact the appropriate area listed below. Your options for consultation and resolution may vary based upon your concern.

Human Resources: Employee and Labor Relations EmployeeRelations@montgomerycollege.edu

- Alcohol or Drug Abuse • Benefit Abuse • Bias Incidents • Incivility
- ADA/Accessibility Support Services • Recruitment Complaints
- Employment Discrimination • Employee Misconduct • Harassment (non sexual)
- Hostile Work Environment • Workplace Violence or Bullying
- Discrimination (Title VII) • Nepotism or Favoritism

Compliance, Risk, and Ethics Ethics@montgomerycollege.edu

- Conflicts of Interest • Ethical Misconduct • Improper Giving/Receiving Gifts
- Regulatory Compliance • Maryland State Ethics Filing and Reporting
- Grants or Research Fraud or Misconduct • Sexual Harassment • Title IX
- Athletic Concerns • Protection of Minors • Disability Discrimination
- Violations of College Policies not otherwise identified

Internal Audit InternalAudit@montgomerycollege.edu

- Accounting and Auditing Matters
- Falsification of Contracts, Reports or Records
- Theft/Embezzlement • Employee Time Reporting or Time Abuse
- Waste, Fraud, Abuse, and Misuse of Institution Resources

IT Privacy & Cybersecurity Compliance ITSecurity@montgomerycollege.edu

- Data Privacy • Inappropriate Use of Technology
- Account Compromise/Credential Theft

Environmental Safety EnvironmentalSafety@montgomerycollege.edu

- Occupational Safety Concerns • Environmental Related Issues

Library libguides.montgomerycollege.edu/copyright

- Copyright Questions and Concerns

Office of Public Safety and Emergency Management 240-567-3333

- Physical Safety and Protection • First Aid • Emergency Assistance
- 24-hour Escort Service (upon request) • Lost and Found

Please contact the Office of Compliance, Risk, and Ethics if your concern is about one of the offices listed above or about a lack of response to a concern. Please contact the Chief of Staff in the Office of the President if your concern is about the Office of Compliance, Risk, and Ethics.

Managing Ethically and with Integrity

Reporting Concerns and Wrongdoing

- For Guidance, see College Policy and Procedure:
 - 31000 – Code of Ethics and Employee Conduct
 - 61008 – Reporting Suspected Acts of Wrongdoing
 - 39003 – Protection Against Retaliation

Managing Ethically and with Integrity

Ethical Scenario

Chris, an employee, is assigned a task by Pat, the supervisor. The task is important to the overall project and requires new skills that Chris either does not have or has a very basic ability. Chris never asks for clarification nor resources, and Pat never checks in for progress reports. Not surprisingly, the task is not completed by the deadline. Pat meets with Chris to discuss missing the deadline, and Chris explains that more direction was needed for this project. Pat, who is angry with Chris, says there are so many moving parts to the entire project that not every step can be monitored.

**Is there an ethical dilemma here?
What would you do to navigate it?**

Managing Ethically and with Integrity

Manager's Toolkit

- Ethics website - Training and Resources:
 - *Ethical Leadership*
 - *Ethical Expectations*
 - *Reporting Concerns*
 - *Avoiding Retaliation*
 - *Additional Resources*

Managers Toolkit

As part of efforts to foster a strong ethical culture at Montgomery College, please note these special resources for managers and supervisors for compliance and ethics information. We encourage managers to share this critical information with their teams. All employees are welcome to utilize these resources. Please contact ethics@montgomerycollege.edu with any questions.

Ethical Leadership | Ethical Expectations | Reporting Concerns | Avoiding Retaliation | Additional Resources

Responsibilities of Leadership

(from the [MC Code of Ethics and Employee Conduct Handbook](#))

Montgomery College employees in supervisory positions are the foundation of college leadership, and their role carries several additional responsibilities.

First and foremost, it is important for supervisors to lead by example. By working ethically and demonstrating high standards for self and others, you support and encourage a civil and professional work environment.

*When establishing and maintaining their unit, supervisors need to set clear expectations and discuss those expectations with employees so they have an adequate understanding of our **Code of Ethics and Employee Standards of Conduct** (PDF, [📄](#)). They must make sure to provide access to resources and strive to promote a culture where employees feel comfortable asking questions and voicing concerns.*

College leaders should also continually work to encourage the development of personnel, acknowledge and retain competent personnel, and seek ways to sustain a high level of morale within their units.

Remember, it is never right to retaliate or tolerate retaliation against any employee for raising concerns that he or she believe to be true.

The OCRE Team



Kristen Roe
Director of ADA
Compliance & Title IX
Coordinator



Susan V. Watson
Chief Compliance, Risk,
and Ethics Officer



Jasmine Ikard
Deputy Title IX
Coordinator & Investigator



Sarah Martin
Senior Compliance
Specialist/Investigator



Maria Adams
Compliance Specialist



Debra (Debbie) Bouyer
Compliance Specialist



Rosa Trigo
Executive Assistant

Managing Ethically and with Integrity

www.montgomerycollege.edu/ethics

Thank You and Best Wishes with Your Team!





Thank You!

HRSTM would like to thank you for your time and participation in attending the Supervisor Orientation.

I've learned that people will forget what you said, people will forget what you did, but people will never forget how you made them feel. – Maya Angelou

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