Employee Engagement Action Plan: Business and Financial Services

Employee Engagement Committee Members:

- Teresa Rodriquez (Chair)
- Leticia Amaro
- Connie Calvin
- Alex Hernandez
- Reggie Hill
- Amanda Moore
- Judith Ramos

Employee Engagement Input Process (Focus groups? Interviews? How many?)
The employee engagement committee offered two focus groups for employees in Business and Financial Services (BFS). The primary group was for non-managerial employees and included seven employees from different areas within the organization. A separate focus group was conducted for the managers by Erika Frahm. Out of the 47 employees in BFS, 12 representative employees provided input via the focus groups.

Core Themes:

- Identify and maintain strengths within BFS. Staff feels part of a collaborative team. Information is shared and communicated properly. Have good working relationships with clients.
- Team Building. More opportunities to develop relationships within BFS and other UT departments.
- Develop more training. Technical skills, Outlook, and email correspondence need improvements. Classes on higher education, organizational tools, and customer service. Staff feel overwhelmed to find options. DocuSign implementation and training across BFS.
- Telecommuting. Promote and implement flexible work arrangements/telecommuting within BFS. Staff will spend less time commuting and in traffic. Provide better work-life balance and improve morale.
- Warehouse Improvements. Implement an inventory management system. Parking concerns when out on deliveries (ticketing UT Vehicle). Review staffing and best business practices. Discuss options to improve working environment such as staggered lunch schedules, purchasing jackets, and air conditioning warehouse.
**Action Items:**

1. **Recognize and maintain strengths within BFS**

   **Action steps and timeline:**
   
   a. Continue Employee Engagement Committee efforts and provide opportunities for new members to participate. Have a minimum of two original committee members.
   
   b. Meet annually to conduct internal survey/focus groups.
   
   c. Follow up with employees and management team to see if suggested methods are working and address any new topics of concern.

2. **Awards**

   **Action steps and timeline:**
   
   a. Management Team will review On the Spot Awards policy and establish an updated internal BFS policy to be implemented by Q3 of FY17-18. Post an updated policy on BFS website and clarify with staff.
   
   b. Implement a new employee recognition program such as a shout out or employee/spotlight of the month. Will send recognition via newsletter to BFS all.

3. **Team Building**

   **Action steps and timeline:**
   
   
   b. Call for volunteers to represent each area within BFS.
   
   c. Events committee will be responsible for organizing, budgeting, and executing team building events based on set criteria from Senior Leadership Team.
   
   d. Focus group recommendations include visiting locations across UT, Lady Bird Lake, museums, team luncheons, and networking with peers and other departments at UT.
   
   e. Receive employee feedback from employee engagement committee and management team on annual basis.

4. **Training**

   **Action steps and timeline:**
   
   a. Docusign implementation and training across BFS.
      
      o Management Team has appointed Accounting Associate Director to survey each area within BFS and identify processes that would benefit from using Docusign.
      
      o Will work with Records Management department on how best to organize electronic documents.
   
   b. Develop Training Plan to be effective in FY18-19.
   
   c. Update position description within accounting department to provide career advancement opportunities.
d. Develop a process map for filling vacant positions. Identify BFS role in process and develop way to shorten time between vacancies.

5. Warehouse Improvements

**Action steps and timeline:**

a. Create Standard Operating Procedure for method in which trucks are loaded for deliveries.

b. Training will be handled by Warehousing Manager to ensure consistency on processes and procedures.

c. Inventory management systems currently being discussed by executive management. Determine if options available will be beneficial to team and customers.

d. Recommend purchasing jackets for Warehousing staff to be utilized during winter FY18-19. Currently using personal jackets that get wear and tear during the work day.

**Quick Wins:**

- Telecommuting and Flexible Work Arrangement. Management Team currently developing a Flexible Work Agreement policy specific for BFS employees. Once finalized, management and staff will have resources and information available on options for Telecommuting and Flexible Work Arrangements.

- BFS Training Series. Management has meet with Erika Frahm in HR to identify and provide various professional development classes specific to BFS staff. Currently have three training classes scheduled at FC1 for FY17-18. Will continue to develop and provide classes in area that staff will benefit from professionally.

- Breakroom is currently being pursued in Warehouse to improve high temperature working conditions during summer months.