

POOLED RESOURCES
professional development and training opportunities for classified employees:

EXECUTIVE SUMMARY

- In 2005, the Montana University System Staff Associations (MUSSA) were charged by the Board of Regents to explore logistics for *Pooled Resources*, a web-based catalog of professional development and training opportunities for classified staff. (Please see “Concept”, page 3).
- MUSSA reported, in November 2005, that *Pooled Resources* was feasible and desirable, and suggested how such a facility might operate. At that time MUSSA was authorized to form an Implementation Committee. The following March, the Regents asked MUSSA to work with the Commissioner’s Office (OCHE) in moving the venture forward.
- OCHE, MUS HR directors, campus administrators, MUSSA, and others duly compiled the Implementation Plan in May of 2006. Participants in the Plan recognized MUSSA’s inability to operate and run *Pooled Resources* itself (please see page 6). Rather, MUSSA committed to an ongoing advisory role, with others providing for additional needs (including program coordination). Launch was set for Fall, 2006. All participants signified their agreement with the Plan, and implementation began.
- After conducting a needs assessment of classified employee training preferences (in January 2006), the program coordinator’s time, allocated to *Pooled Resources* as per the Implementation Plan, ceased to be available. This was due to staffing and resource difficulties within the UM Human Resources department (MUSSA remains grateful, however, for the inherent support of the HR Director). MUSSA tried itself to collect the necessary inventory, in an attempt to bring *Pooled Resources* to launch by the Fall 2006 deadline. The task was too large for MUSSA to accomplish. Nevertheless, the effort resulted in the establishment of some leads which will be useful as the project proceeds under established program coordination.
- At the November 2007 Board of Regents meeting, Kevin McRae undertook to work further with MUSSA as regards *Pooled Resources*. In a conference call, in January 2008, he requested MUSSA submit a report ,detailing what the program needs to launch and continue to function, which he might use in discussing the dilemma further with MUS HR directors. Kevin has indicated his opinion that any way forward for *Pooled Resources* program coordination would likely be limited to use of existing MUS personnel.
- With this document, MUSSA is responding to Kevin McRae’s request:
 - To launch *Pooled Resources* MUSSA estimates it will require 240-300 hours of program coordination to draw in inventory (please see page 7). Once launched it is anticipated that 2-3 hours per month of on-going maintenance will be required.
- **MUSSA respectfully submits:**
 - *Pooled Resources* is well supported by the Board of Regents and local executives (as documented in this report generally). Further, it is a momentous demonstration of MUS collaboration in addressing University System objectives and issues; not least classified recruitment and retention problems (please see page 3)

- *Pooled Resources* is well on the way to launch, with the necessary staff interest and momentum already flowing (please see page 6), and some inventory leads in place
- All that prevents *Pooled Resources* from going live (assuming a commitment can be made in time to preserve corresponding donations of web support) is a small investment of time and effort to list the links, URLs, and contact information necessary to access the training materials (please see page 7)
- In order to adequately prepare its report to the Regents, due in May - and potentially to negotiate the maintenance of web support, and associated line of credit, beyond June 30 - **MUSSA humbly requests to be informed by May 1, 2008:**
 - whether the necessary program coordination can be provided (e.g. by an employee, or perhaps a for-credit student intern) in order to launch *Pooled Resources* by the end of December, 2008 and to pilot the program for two years (please see page 7).
 - **If so:** MUSSA will fulfill its Implementation Plan promise to launch, guide and advise *Pooled Resources*, in combination with such program coordination, with a revised launch date of December, 2008;
 - **If not:** MUSSA suggests that a combined OCHE/MUSSA announcement be made to the Regents (at MUSSA's next meeting with the Board, in May) to the effect that the *Pooled Resources* currently lacks the viability to proceed and that all parties plan to move on to other, more achievable, projects.

Footnote: it should be noted that, in 2007, Betsy Hawkins replaced Rob Gannon as Director of Human Resource Services at the University of Montana.

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**POOLED RESOURCES:
FULL STATUS REPORT**

Since July 2005, the Montana University System Staff Associations (MUSSA) have been highly commended by the Board of Regents and the Commissioner of Higher Education for, among other things, their truly collaborative success in bringing the eight campuses together in the progression of an economic, Montana University System (MUS) mission-fulfilling project, with real staff recruitment and retention potential: *Pooled Resources*.

Staff appreciation of *Pooled Resources* was strongly expressed when classified employees were invited to identify and prioritize their needs a year ago. Harnessing employee enthusiasm for *Pooled Resources* has been acknowledged as vital to the long-term success of the program (please see page 6). MUSSA hoped to launch *Pooled Resources* as soon as possible after the needs assessment, so that it would advantage from this essential staff-driven momentum. Unfortunately, budgetary and staffing issues prohibited the provision of the necessary program coordination and, despite MUSSA's additional efforts to perform the task, *Pooled Resources* has not progressed.

Now, at the invitation of Kevin McRae, MUSSA respectfully submits this document to the Commissioner's Office, and for MUS Human Resources directors, in the hope of bringing the project to fruition before this positive staff energy is entirely lost. Having awakened employee interest, with the needs assessment, letters of support from the Regents and local executives, MUSSA feels that following through and providing the service is of importance to workforce morale.

Attached is the Board of Regents' letter of support (11/27/06), and the Implementation Plan (5/26/06). Further relevant information is available via MUSSA's reports of its interactions with the Board of

Regents (www.montana.edu/staffsenate/borpage.html), from other *Pooled Resources* documentation (www.montana.edu/staffsenate/pooledres.html), and the MUSSA web site (in the early stage of development it has currently reached) which eventually will become the *Pooled Resources* on-line facility (www.montana.edu/mussa).

THE CONCEPT

Pooled Resources is the working title for a very simple concept by which any and all pre-existing professional development and training (PD&T) materials found anywhere within the MUS are made available for the use of the System's entire classified work force. These resources may be proven or potential, and may consist of articles, books, podcasts, facilitator-led workshops, links to on-line training, or any other resource that might enrich the knowledge and skills of classified employees.

It is intended that *Pooled Resources* be used by the staff to connect with PD&T opportunities, for their custom use, through any computer with Internet access. The strength of *Pooled Resources*, both in terms of its initial content and its on-going growth, will be determined by its users. The concept's success is reliant on, to quote the Board of Regents' November 2006 letter (attached) "a culture of continued education for classified staff" and "the long term commitment of the MUS to the development and growth of the *Pooled Resources* facility".

Pooled Resources is designed to offer access to materials submitted by individuals, departments, organizations, or groups from across the MUS, via a web-based "catalog".

Every MUS classified employee was invited to identify their priority training topics in January, 2006. The outcome of this needs assessment will be used to guide initial inventory collection efforts, and establish *Pooled Resources'* inaugural content.

The catalog will consist of links to (i) literature already published on-line, (ii) ISBN and other appropriate details of recommended books, (iii) workshop facilitators' contact information, (iv) class schedules, (v) campus specific policy/procedure, etc. This is the inventory (links and contact information rather than, for example, hard copy materials). The catalog will be sorted by topic, and be searchable using key words. In a "self service" environment, users will follow links, print documents, make all inquiries regarding any of the contacts, classes and literature offered via *Pooled Resources*. No facilitation of training is necessary through *Pooled Resources* itself. It is intended that employee enthusiasm for the facility, the richness of the initial inventory (i.e. how well the content meets users' needs), and their regular feedback, will supply a self-sustaining vibrancy to *Pooled Resource*. On-going program coordination requirements can therefore be limited to periodically assessing user satisfaction, collecting inventory, and maintaining the catalog.

Potential Return on a Small Investment

Since the resource inventory is free, and program maintenance is minimal, a very small investment by the MUS could reap an immeasurable return as it:

- Exhibits true *MUS collaboration*
- Maximizes *full potential* of underutilized MUS resources
- Offers strong *recruitment and retention* potential
- Improves *staff efficiency* and effectiveness

- *Services a known need* (as demonstrated, for example, by the professional development, training, and career advancement aspects of 9 of the 23 classified tactics of MSU’s Five Year Vision)
- Preserves *institutional knowledge* via staff retained, for instance, through increased opportunity or job satisfaction resulting from professional growth
- Enhances the *complete student experience*, through heightened staff effectiveness, thus impacting student retention
- Places the responsibility of training at the *level of need*, with potential provision of any topic
- Provides *equal access* to all staff
- Utilizes various training media (written, in person, on-line), providing for most *learning preferences*
- Presents *potential for community involvement*

MUSSA stresses that *Pooled Resources* is an evolving concept; a “living” project, the success of which is as reliant upon user engagement as user satisfaction is upon the richness of the content.

HISTORY

<p>July, 2005</p>	<p>MUSSA, Board of Regents, Commissioner of Higher Education, and Presidents Dennison and Gamble meet and further discuss non-salary initiatives for recruitment and retention. Professional development and training (PD&T) for classified staff identified as a priority initiative. Necessary knowledge and materials exist within the MUS. System mission is to educate. <i>Pooled Resources</i> concept initiated with strong support of the Regents.</p>
<p>Fall, 2005</p>	<p>MUSSA representatives extensively research logistics of <i>Pooled Resources</i> on their campuses. Feasibility study created.</p>
<p>November, 2005</p>	<p>MUSSA presents the <i>Pooled Resources</i> feasibility study at the Board of Regents meeting. Excerpt from MUSSA notes: The Regents and Commissioner were highly complimentary of the Senates' collaborative work and initiative on this project. They encouraged this method of enhancing staff productivity and effectiveness and felt that, since education is the business of the MUS, the concept made perfect sense. They were interested in more information on the resources required to create the facility, but it was conjectured that the net gain could far exceed the necessary resources. The Regents wondered about the time and commitment needed to bring the concept to fruition. The Senates described their endeavors to identify the barriers to progressing the project and how they considered the greatest challenge to be reining in a concept of such vast potential to manageable dimensions. The overwhelming support offered from each campus as the Senates conducted their research was reported, and the Senates did not foresee a want of commitment on any campus.Commissioner Stearns invited the Senates to participate in a system-wide HR directors' meeting to discuss the project, its barriers and its benefits.Chairman Mercer duly authorized the request made by the Senates in their report: for the Senates to take the lead in forming an Implementation Committee, comprising appropriate participants from each campus, including representatives from each Senate and from the Office of the Commissioner of Higher Education.</p>
<p>March, 2006</p>	<p>Board of Regents meeting. Excerpt from MUSSA notes:</p> <p>Once again, the Regents were enthusiastic about the project, and complimentary of MUSSA's work to date. MUSSA members answered various questions, including:</p> <ul style="list-style-type: none"> • <i>How would resources be chosen to ensure the facility's richness of content?</i> (the needs assessing and inventory processes were described in more detail). • <i>Will the facility provide accredited trainings?</i> (potentially, yes. One of the experts we consulted described a similar facility she had created which offered certifications. MUSSA recommends collaboration over this, such that the MUS would recognize resulting certification in the recruitment process). • <i>What is the anticipated work plan and time line, and what are MUSSA's preferences - how do we invest in ourselves?</i> (program coordination would initially be intense with needs assessing, etc, but maintenance and growth of the facility would be more easily managed. The manpower for this could perhaps be

	<p>merged long term to also provide for other MUS needs. MUSSA expects the Regents to need time for further consideration of the proposals, and ideas of their own, and we respect budgetary constraints. However, we recommend proceeding as soon as possible, to maximize the input already contributed, with the strongest possible program coordination to harness future momentum and to produce a rich facility).</p> <ul style="list-style-type: none"> • A Regent perspective was reiterated: that the Pooled Resources concept allows for increased staff productivity and continuity plus offering a recruitment and retention tool. MUS is in the business of education. The project fits that mission and, if necessary, investment in properly running the program will potentially be worthwhile. <p>The Regents had some logistical questions for Kevin McRae, OCHE Director of Labor Relations following which they directed MUSSA to continue discussion with Kevin and HR directors to determine how best to take the project to the next level. Since MUSSA does not meet with the Regents again until September, and acknowledging our time frame preferences, the Board authorized interim communication with them through Kevin and/or Commissioner Stearns.</p>
May, 2006	Implementation Plan finalized (attached) after email discussion and conference calling) and each Project Partner's approval and agreement signified electronically and recorded by MUSSA. Please see this document for a list of Partners and the commitment made by each.
July, 2006	MUSSA Retreat confirmed the basics of the <i>Pooled Resources</i> web site and MUSSA logo designs. Conference call with UM's designated program coordinator. Needs assessment initiated.
September, 2006	Board of Regents offer MUSSA a letter supporting the <i>Pooled Resources</i> concept, and the growth of a culture of continued education for classified staff at each institution. MUSSA to coordinate with Kevin McRae in pursuing the other recruitment and retention initiatives discussed.
October, 2006	MUSSA lists recruitment and retention initiatives discussed with Regents in September and begins work pursuing them. PD&T remains a priority. MSU Northern and MSU reps meet with MUS HR directors briefly in Bozeman and MUSSA is invited to return in December, 2006. (Unfortunately the December meeting never proved possible, although some progress on the initiatives was initiated on individual campuses).
November, 2006	MUSSA <i>Pooled Resources</i> planning meeting, and update presentation to the Board of Regents. Regents' letter of support received. Web site being developed. Needs assessment being devised.
January, 2007	Web site live. Regents' letter, and memos of support from local executives, sent to all faculty and staff of every campus. Needs assessment executed and priority topics identified. Much classified employee enthusiasm for <i>Pooled Resources</i> is expressed.
February, 2007	Board of Regents meeting. MUSSA reports <i>Pooled Resources</i> ' launch anticipated for April. Kevin McRae suggests pursuing the October recruitment and retention initiatives list via the OCHE Recruitment and Retention Task Force rather than a meeting with HR directors. MUSSA continues local efforts also.
Spring, 2007	Program coordination (labor) for inventory collection is not forthcoming. Launch delayed. MUSSA attempts to collect inventory itself.
July, 2007	MUSSA retreat. Inventory collected to date is insufficient for launch. MUSSA will concentrate its efforts with the aim of launching in September.
September, 2007	MUSSA reports to the Board of Regents that it cannot populate the <i>Pooled Resources</i> website itself. Status of provision of program coordinator unclear. MUSSA requests Board's further direction at next meeting (OCHE Recruitment and Retention Task Force recommendations in respect of classified PD&T noted).
November, 2007	MUSSA reports no progress on provision of program coordination assistance. Board of Regents refer to Kevin McRae, who reports OCHE's intent to help, perhaps by

	offering some limited, stop gap PD&T, possibly in the form of workshops offered on each campus.
January, 2008	MUSSA conference call with Kevin determines that some limited workshops may be offered on a “touring” basis. MUSSA respectfully requests that any stop gap efforts be redirected into inventory collection for the initial population of the <i>Pooled Resources</i> web facility. Kevin asks for a summary of the <i>Pooled Resources</i> situation, with MUSSA’s recommendations for his, and HR directors’ consideration.

CURRENT STATUS

Why Is Staff Interest and Momentum Important?

MUSSA has consistently reported its opinion that the success of the *Pooled Resources* concept is primarily reliant on: (i) harnessing staff enthusiasm for the facility, and (ii) accommodating the fact that, while MUSSA can make a significant contribution to maintaining momentum on each campus and guiding the program, it is not able to run *Pooled Resources* itself. The two are interdependent: *Pooled Resources* needs staff input to direct the focus of the program coordination; but without the program coordination required to meet their PD&T needs, the staff will lose interest.

Why Can’t MUSSA Run *Pooled Resources* Itself?

MUSSA remains deeply committed to the benefits (to both the University System and its staff) of the *Pooled Resources* concept. MUSSA undertook – and continues - to support the facility in every way possible, within its limitations (the voluntary nature of its membership, and the other responsibilities of each staff organization represented). In May, 2006, in acknowledgement of MUSSA’s inability to fulfill the program coordination function (i) financing was offered by MSU’s Administration & Finance division for web creation (this line of credit remains open through FY08), and (ii) manpower was garnered by the University of Montana’s HR Director. Despite subsequent personnel changes and resource limitations within the department, the current UM HR Director remains strongly supportive of *Pooled Resources*, even though she understandably cannot provide the assistance required at this time.

A Possible Stop Gap Measure

Kevin McRae has mentioned that OCHE is exploring the possibility of coordinating some limited PD&T offerings (perhaps workshops to be delivered on each campus). MUSSA greatly appreciates OCHE’s willingness to provide a temporary measure. However, since the necessary duration of such a stop gap is indeterminable, MUSSA respectfully suggests a better investment could be made by redirecting any temporary efforts into permanently populating the *Pooled Resources* site, as originally planned.

Priority Topics

MUSSA’s needs assessment revealed staff priorities for professional development and training to fall in the following areas:

- Web Design & Maintenance
- Computer Training (All Levels)
- Improving Workplace Morale
- Microsoft Office Programs
- Healthy Living
- Organizational Leadership
- Customer Conflict Management
- Strategic Planning & Goals
- Managing Change
- Financial Planning & Budgeting
- Communication Skills
- Develop/Change Your Career/Field
- Time Management/Organization
- Culinary Skills
- Workplace Safety/First-Aid
- Safe Use of Custodial Equipment
- Banner

What Will It Take To Collect The Inventory?

To aid the collection of inventory, an on-line tool is available at www.montana.edu/mussa . Through this site, donors may log the details of the PD&T resources they are willing to share. MUSSA members have identified likely sources of such offerings from each campus.

Inventory collection will require making contact with these, and any other sources; following up to ensure donations are submitted via the on-line inventory tool; and conveying the data received to the *Pooled Resources* web developer. For the purpose of continuity, it is preferable that the work be conducted by one person but it is possible that a well-coordinated team, or internship involving different students, could be used. The program coordinator(s) could be based at any MUS location.

In early Fall, 2006 MUSSA contracted with Tim Daniel, a UM employee, for the number of web development hours necessary to bring the web site to launch-readiness, and to set the site up for subsequently easy on-going maintenance (essentially, the loading of future resource submissions). The line of credit (donated by MSU's Admin & Finance division) is good through FY08 and, in the Fall of 2007, Tim was able to remain on standby to complete this task. Continued availability of both must be re-established in accordance with a time line running beyond June 30, 2008.

Two Year Pilot

MUSSA acknowledges the need for *Pooled Resources* to prove itself as a viable long-term offering, and suggests committing now to a two-year pilot period. Further, MUSSA is comfortable with launching *Pooled Resources* with a good stock of inventory in not less than ten of the above priority topics. Additional materials should be solicited periodically and these, along with the remainder from the original inventory collection, will provide new resources for program expansion over the 24 months post-launch.

How Many Hours of Program Coordination Are Needed?

MUSSA estimates it will take 240-300 hours to facilitate inventory collection for all the priority topics and conveying them to the web developer. Plus 2-3 hours per month, post-launch, to keep *Pooled Resources* functioning. Post-launch activity will include communicating with MUSSA over usage, facilitating periodic user evaluations, loading and announcing new materials, and basic maintenance of the web site. It is anticipated that technical maintenance (such as testing that links remain functional) could be carried out electronically using appropriate software.

MUSSA respectfully requests consideration of the following:1. How Might Program Coordination be Provided?

Program coordination, sufficient to bring *Pooled Resources* on-line and to run the two year pilot (please see above), could be provided in a number of ways or combination of ways, for example:

- labor donated for the purpose. This is similar to the original commitment under the Implementation Plan, where a department or departments authorize employees/work studies/student interns to perform the program coordination tasks as part of their existing job descriptions. Costs are thus absorbed or shared;
- re-direction of any labor possibly earmarked by OCHE for the provision of stop gap training offerings (pending an eventual launch of *Pooled Resources*) into program coordination;
- one time monies funding: a temporary hourly classified hire; the temporarily increased FTE of a currently part-time worker; or paying additional compensation/over time to an existing employee. Such monies may be forthcoming as a -

- contribution from one or more sources anywhere within the MUS; and/or
- re-allocation of any funds earmarked by OCHE for the provision of stop-gap training offerings (pending an eventual launch of *Pooled Resources*) into program coordination.
- creation of a for-credit student internship.

2. The Time Line:

- **Confirmation of support - by May 1, 2008:** in preparation for reporting to the Board of Regents at the May meeting (as per the MUSSA submission to the Regents, 2/20/08), MUSSA humbly requests to be informed of whether or not the necessary program coordination can be provided
 - for a *Pooled Resources* launch not later than the end of December, 2008; and
 - to run the program for two years (please see above).
- **Other considerations:** in allowing OCHE and HR directors adequate time to consider this document, and asking for confirmation of program coordination by May 1, MUSSA notes the potential need to negotiate to maintain web support, and its associated line of credit, beyond June 30.
- **Inventory collection:** allowing for resource donors' availability (before summer vacation season), data upload and thorough site testing, MUSSA recommends completing inventory collection by July 1, 2008.
- **Launch:** bearing in mind the pressing need to harness staff momentum, aroused following the Regents' and Executives' letters, needs assessment, and staff association "marketing" that has occurred to date, MUSSA believes it is imperative to launch *Pooled Resources* **during fall semester, 2008.**

CONCLUSION

MUSSA is delighted to respond to Kevin McRae's request for details of what we consider necessary to bring *Pooled Resources* on-line. As is widely acknowledged, MUSSA has invested two years of planning and coordination in hopes of bringing *Pooled Resources* to fruition. We have been gratified by the support and enthusiasm offered by the classified staff on all campuses, the Regents, the Commissioner, campus administrators, Kevin McRae, and HR directors. Despite MUSSA's inability to run *Pooled Resources* itself, we recognize the massive potential return on the small investment needed to launch and maintain the program. Therefore, MUSSA has sustained its efforts to bring *Pooled Resources* to this point. Everything is in line and essentially all that now prevents *Pooled Resources* from achieving its full potential is a minor amount of time and effort spent in program coordination.

MUSSA is ready to fulfill its promise to launch and guide the program. We humbly request, therefore, to be informed by May 1 whether the necessary program coordination can be provided (e.g. by an employee, or perhaps a for-credit student intern) to launch *Pooled Resources*, and to run a basic offering for two subsequent years (please see page 7).

If it is, MUSSA will resume work with the new program coordinator(s) as per the original guidelines set out in the Implementation Plan. If it is not, we suggest delivering a joint MUSSA/OCHE statement to the Regents (at our next scheduled meeting in May) to the effect that the *Pooled Resources* currently lacks the viability to proceed and that all parties plan to move on to other, more achievable, projects.

MUSSA is most grateful for your kind consideration of this document, which we look forward to discussing further with you, and the HR directors, at your convenience.