UI Staff Development Resources

1. Staff Professional Development Awards from UI Learning & Development
   a. Call for applications from University HR by email in spring and fall semesters. Covers the cost of specific fee-based workshops offered on campus.
   b. Eligibility:
      i. 50% time
      ii. Regular (non-temporary) staff

2. Mary Jo Small Fellowship
   a. https://hr.uiowa.edu/learn/mary-jo-small-staff-fellowship-award
   b. Competitive application process. Provides funding up to $1500 for staff to attend off-campus conferences that will benefit their work for the UI. Application is available in Self-Service, with two award periods annually.
   c. Eligibility:
      i. 50% time
      ii. Regular staff
      iii. Employed at UI for 2 consecutive years

3. Professional Development Internships for Staff
   a. https://hr.uiowa.edu/learn/internship
   b. Staff may identify a development internship with another unit/department on campus, and request supervisory approval to spend a designated amount of time working in the internship role.
   c. Eligibility:
      i. 50% time
      ii. Regular staff
      iii. Employed by UI for 2 years
      iv. Successful in current position
   d. If regular salary is funded by external grants, staff may not do the internship during regular working hours.

4. Tuition Assistance
   a. https://hr.uiowa.edu/tuition
   b. Faculty and staff may apply for financial assistance to defray the cost of tuition (not fees) for one college credit course up to 4 credit hours per semester. Application is available in Self-Service and must be routed to the supervisor for approval. Two funding cycles per year.
   c. Eligibility:
      i. 50% time
      ii. Regular staff and faculty
      iii. Employed by UI for 1 year
5. **Robert F. Ray Staff Scholarship**
   a. Scholarship for staff members pursuing undergraduate study at the UI.
   b. Information available from Distance and Online Education dce-scholarships@uiowa.edu

6. **Auditing UI Courses**
   a. Staff/faculty may audit one UI course/semester for free. The course must contribute to their development in their current position and must be approved by the supervisor and by the Dean (for faculty only).
   b. Application through the Registrar’s Office
      https://registrar.uiowa.edu/sites/registrar.uiowa.edu/files/wysiwyg_uploads/faculty_staff_application_to_audit_0.pdf
   c. Eligibility:
      i. Regular staff and faculty
      ii. Must be admitted as a degree or non-degree student

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**CoE Resources**

1. **CoE Professional Development Funding**
   a. The College has limited funding available to support development of administrative staff in the academic departments whose salaries are paid on GEF.
   b. Requests are submitted to Jan Waterhouse, Director of Human Resources
   c. CoE funding is typically limited to $1500/year/person
   d. Department is expected to contribute if total cost exceeds $1500
   e. Staff in research centers (CCAD/IIHR) should request financial support through the research center.
### UI Career Development Process

#### Comparison Chart

<table>
<thead>
<tr>
<th></th>
<th>Career Advancement</th>
<th>Promotion</th>
<th>Career Shift</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Description</strong></td>
<td>Recognizes growth within the existing classification.</td>
<td>Move to a different classification at a higher pay level.</td>
<td>Move to a different classification at the same or lower pay level.</td>
</tr>
<tr>
<td><strong>Justification</strong></td>
<td>New duties, skills, competencies, or expanded scope of responsibility.</td>
<td>Significant change in duties or authority, or new Key Areas of Responsibility.</td>
<td>Significant change in duties, change in Key Areas of Responsibility.</td>
</tr>
<tr>
<td><strong>Classification</strong></td>
<td>N/A</td>
<td>UI Comp &amp; Class</td>
<td>UI Comp &amp; Class</td>
</tr>
<tr>
<td><strong>approval</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Salary approval</strong></td>
<td>CoE if within median zone. UI HR if above median zone.</td>
<td>CoE if within median zone. UI HR if above median zone.</td>
<td>CoE if within median zone. UI HR if above median zone.</td>
</tr>
<tr>
<td><strong>Salary adjustment</strong></td>
<td>1-5%</td>
<td>1-10% up to range max.</td>
<td>0-5% if same pay level. 0% or decrease if lower pay level.</td>
</tr>
<tr>
<td><strong>Effective date</strong></td>
<td>First of following month.</td>
<td>First of following month.</td>
<td>First of following month.</td>
</tr>
</tbody>
</table>

[https://hr.uiowa.edu/career-development](https://hr.uiowa.edu/career-development)
Sample Completed Documentation for Career Development
Career Advancement – Research Hawk – Research Assistant (PRK1)

The University of Iowa

Documentation of Career Development

Complete Directions for Form available at: http://hr.uiowa.edu/career-development/form-instructions

Section 1 – Demographics (Employee and/or Supervisor)

Employee Name: Research Hawk
Current Classification/Job Code: Research Assistant / PRK1

Department: Biology
Supervisor: Ima Boss

Initiated by: Research Hawk
Date Initiated: 11/1/2016

Section 2 - Scope/Responsibilities (Employee and/or Supervisor)

Please list the six most important activities that are performed. If the duty is new since the last time the employee/position was classified, please indicate so and note the % of effort for the new work. Identify the Key Areas of Responsibilities (KAR) for those six activities and the classification associated with it (which may be the current classification or another one). Identify the total or overall amount of time spent in performing each activity. The percentage of time cannot exceed 100%, however, the percentage of time can be less than 100% because we are only asking for the top 6 (six) most important activities.

<table>
<thead>
<tr>
<th>Position Specific Duties</th>
<th>Is this a new duty?</th>
<th>Key Area of Responsibility</th>
<th>Classification</th>
<th>Overall or Total % of Effort</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contribute to the research projects by conducting literature searches, interpreting and adapting published research protocols to meet and expand lab research goals, (e.g. ________________).</td>
<td>×</td>
<td>Research</td>
<td>Research Associate</td>
<td>10</td>
</tr>
<tr>
<td>Previously assisted with conducting literature searches. The new duty is focused on the interpretation of published research protocols to meet and expand lab research goals and represents 10% of overall effort.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Designed, made, and test a new model for the study (e.g. ________________). Develop new protocol, (include example) that increases accuracy of experiments. This new duty accounts for 5% of my experiment time. Perform experiments in molecular biology on _____ based upon lab protocols, record results, and present findings.</td>
<td>×</td>
<td>Experiments, Investigations, Evaluations</td>
<td>Research Assistant</td>
<td>40</td>
</tr>
<tr>
<td>Manage lab animals by interacting with the Office of Animal Resources to assure the proper ordering and transfer in and out of facilities on and off campus. Develop systems and forms to manage breeding colony status.</td>
<td>×</td>
<td>Administrative and Project Management</td>
<td>Research Associate</td>
<td>10</td>
</tr>
</tbody>
</table>
### Position Specific Duties

<table>
<thead>
<tr>
<th>Description</th>
<th>Is this a new duty?</th>
<th>Key Area of Responsibility</th>
<th>Classification</th>
<th>Overall or Total % of Effort</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maintain lab equipment and supplies; create new forms and procedures to organize lab resources; assure lab safety by reviewing and implementing safety procedures.</td>
<td>✗</td>
<td>Facilities and Equipment Management</td>
<td>Research Associate</td>
<td>5</td>
</tr>
<tr>
<td>Record experiment findings by summarizing data and developing it into figures for reports and publications.</td>
<td>✗</td>
<td>Collect, Analyze and Summarize Data; Prepare Reports; Contribute to Manuscripts, Publications</td>
<td>Research Assistant</td>
<td>10</td>
</tr>
<tr>
<td>Provide guidance to undergraduate students on lab protocols and safety procedures</td>
<td>✗</td>
<td>Supervision/Staffing</td>
<td>Research Assistant</td>
<td>3</td>
</tr>
</tbody>
</table>

### Section 3 – Competencies to Perform the Job (Employee and/or Supervisor)

List (in the first column) the competencies the employee has acquired or developed in order to be successful in performing the key areas of responsibilities documented in section 2 of this form. The first column may be completed by the employee or the supervisor. Identify the competency name, the expected proficiency level (basic, working, extensive, expert/leader) and at least one typical behavior demonstrated by the employee. Relevant competencies for each University classification have been identified and may be viewed through the e-personnel file in Employee Self-Service.

The supervisor completes the second and third column indicating if the competency listed in the first column is developed or continuing to be developed.

<table>
<thead>
<tr>
<th>Competencies</th>
<th>Continuing to Develop</th>
<th>Developed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Research (Extensive): Discusses issues and considerations for using different types of research approaches. Designs and conducts research in area of expertise.</td>
<td>✗</td>
<td>✓</td>
</tr>
<tr>
<td>Research Ethics/Compliance (Basic): Recognizes ethical/compliance requirements within own area of responsibility. Recognizes the rationale and importance of research and compliance requirements.</td>
<td>✓</td>
<td>✗</td>
</tr>
<tr>
<td>Research Analysis (Extensive): Analyzes published research reports and their possible implications. Interprets new findings and analyzes their validity.</td>
<td>✗</td>
<td>✓</td>
</tr>
<tr>
<td>Laboratory Testing (Extensive): Recommends solutions to improve existing procedures of laboratory tests.</td>
<td>✗</td>
<td>✓</td>
</tr>
<tr>
<td>Laboratory Supply and Inventory Management (Working): Employs inventory management systems and tools to monitor supply levels. Explains established procedures, documentation requirements and approval levels.</td>
<td>✗</td>
<td>✓</td>
</tr>
</tbody>
</table>
Section 4 – Employee Recommendation Job Classification/Career Development
(Only if Employee Initiated)

Which job classification (may be current or different) do you feel best matches the changes documented on this form?

Title: Research Assistant
Jobcode: PRK1

This appears to qualify for: ☒ Career Advancement ☐ Promotion ☐ Career Shift ☐ No Change

The following section is for Supervisors Only

Section 5 – Supervisor Section

A. Assessment/Comments

Document if and how the employee has assumed each of the new, changed or expanded duties/competencies and the importance of these duties/competencies to unit operations.

Research Hawk has advanced his skills and responsibilities and is developing towards a Research Associate. His creativity in designing a new tool and his critical analysis of new research models and ability to adapt them to our lab has helped advance our research faster with more reliable results. This demonstrates his advancing ability in conducting research and experiments. I believe that he will continue to expand his skills which may support his future advancement. In addition to his research skills development, his contributions to research and lab management (animal care, lab equipment, and lab safety) are valued in our small lab as it relieves me from these administrative duties. For these reasons, I recommend him for a career advancement as he has taken on some responsibilities as outlined at the next higher-level classification.

B. Overall performance rating at last formal performance review

Date of Last Review: 6/8/2016

Did the employee receive a performance rating of “Successfully Meets Expectations” or higher on their most recent performance evaluation? ☒ Yes ☐ No

C. Job Classification/Career Development Recommendation

Which job classification (may be current or different) do you feel best matches the changes documented on this form?

Title: Research Assistant
Jobcode: PRK1

This appears to qualify for: ☒ Career Advancement ☐ Promotion ☐ Career Shift ☐ No Change

Section 6 – Employee and Supervisor Electronic Signature

I agree that this represents a true and accurate documentation of the work being performed.

☒ Supervisor ☒ Employee

Date: 11/5/2016
Sample Completed Documentation for Career Development

Career Shift – Mary Hawk – Administrative Services Specialist (PAA2) to Accountant (PBF1)

The University of Iowa

Documentation of Career Development

Complete Directions for Form available at: [http://hr.uiowa.edu/career-development/form-instructions](http://hr.uiowa.edu/career-development/form-instructions)

Section 1 – Demographics (Employee and/or Supervisor)

<table>
<thead>
<tr>
<th>Employee Name:</th>
<th>Mary Hawk</th>
<th>Current Classification/Job Code:</th>
<th>Admin Svcs Spec / PAA2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department:</td>
<td>Big Department</td>
<td>Supervisor:</td>
<td>Adam Accountant</td>
</tr>
<tr>
<td>Initiated by:</td>
<td>Adam Accountant</td>
<td>Date Initiated:</td>
<td>12/1/2016</td>
</tr>
</tbody>
</table>

Section 2 - Scope/Responsibilities (Employee and/or Supervisor)

Please list the six most important activities that are performed. If the duty is new since the last time the employee/position was classified, please indicate so and note the % of effort for the new work. Identify the Key Areas of Responsibilities (KAR) for those six activities and the classification associated with it (which may be the current classification or another one). Identify the total or overall amount of time spent in performing each activity. The percentage of time cannot exceed 100%, however, the percentage of time can be less than 100% because we are only asking for the top 6 (six) most important activities.

<table>
<thead>
<tr>
<th>Position Specific Duties</th>
<th>Is this a new duty?</th>
<th>Key Area of Responsibility</th>
<th>Classification</th>
<th>Overall or Total % of Effort</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monitor accounts, review and approve expenditures, and reconcile monthly financials for the department. Previously performed this duty only for the unit at about 5% of effort. The new duties represent an additional 15% of effort.</td>
<td>☑️</td>
<td>Financial Oversight &amp; Budgeting: Monitor accounts/expenditures; reconciles statements.</td>
<td>Accountant</td>
<td>20</td>
</tr>
<tr>
<td>Prepare monthly reconciliations and assists Senior Accountant in month end and year end reporting.</td>
<td>☑️</td>
<td>Financial Reporting: Complete basic and some complex reconciliations and reporting</td>
<td>Accountant</td>
<td>10</td>
</tr>
<tr>
<td>Analyze department expenses and prepare reports for Senior Accountant for further analysis and recommendations to department leadership. Previously performed this duty for the unit only at about 5% of effort. The new duties represent an additional 10% of effort.</td>
<td>☑️</td>
<td>Financial Analysis and Planning: May perform limited analysis and prepare standard reports.</td>
<td>Accountant</td>
<td>15</td>
</tr>
</tbody>
</table>
### Position Specific Duties

<table>
<thead>
<tr>
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<th>Classification</th>
<th>Overall or Total % of Effort</th>
</tr>
</thead>
<tbody>
<tr>
<td>Make original and correcting journal entries; approve transactions; open and close accounts as directed by Senior Accountant for entire department. Previously performed this duty at about 3% of effort. The new duties represent an additional 7%.</td>
<td>✗</td>
<td>Transaction Processing: Initiate basic and/or routine original and correcting journal entries</td>
<td>Accountant</td>
<td>10</td>
</tr>
<tr>
<td>Maintain records of accounting transactions for the department. Previously performed this duty at about 2% of effort. The new duties represent an additional 8%.</td>
<td>✗</td>
<td>Compliance: Maintain records</td>
<td>Accountant</td>
<td>10</td>
</tr>
<tr>
<td>Research purchases, costs, etc., for budget development for the department. This duty represents a completely new duty and 10% of effort.</td>
<td>✗</td>
<td>Financial Oversight &amp; Budgeting: May assist with unit budget information.</td>
<td>Accountant</td>
<td>10</td>
</tr>
</tbody>
</table>

### Section 3 – Competencies to Perform the Job (Employee and/or Supervisor)

List (in the first column) the competencies the employee has acquired or developed in order to be successful in performing the key areas of responsibilities documented in section 2 of this form. The first column may be completed by the employee or the supervisor. Identify the competency name, the expected proficiency level (basic, working, extensive, expert/leader) and at least one typical behavior demonstrated by the employee. Relevant competencies for each University classification have been identified and may be viewed through the e-personnel file in Employee Self-Service.

The supervisor completes the second and third column indicating if the competency listed in the first column is developed or continuing to be developed.

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<tr>
<th>Competencies</th>
<th>Continuing to Develop</th>
<th>Developed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounting (working): Follows regulations for entering and reporting the financial content in the University’s accounting system.</td>
<td>✗</td>
<td>☐</td>
</tr>
<tr>
<td>General Ledger (working): Performs inputs to the general ledger.</td>
<td>✗</td>
<td>☐</td>
</tr>
<tr>
<td>Financial Reporting (working): Uses basic tools to create financial reports.</td>
<td>✗</td>
<td>☐</td>
</tr>
<tr>
<td>Managing Expenses (basic): Use the basic tools necessary for managing expenses and budgets.</td>
<td>☐</td>
<td>✗</td>
</tr>
</tbody>
</table>
Section 4 – Employee Recommendation Job Classification/Career Development (Only if Employee Initiated)

Which job classification (may be current or different) do you feel best matches the changes documented on this form?

Title: Accountant  
Jobcode: PBF1

This appears to qualify for:  
☐ Career Advancement  
☐ Promotion  
☒ Career Shift  
☐ No Change

The following section is for Supervisors Only

Section 5 – Supervisor Section

A. Assessment/Comments

Document if and how the employee has assumed each of the new, changed or expanded duties/competencies and the importance of these duties/competencies to unit operations.

As Mary's supervisor, I am submitting this request for a career shift. Due to a resignation and lack of resources to rehire, Mary has expanded her financial skills which she performed as part of her Administrative Services Specialist job to assist me in managing the finances of our large department. Our department has many accounts in various funding streams which require vigilance to assure financial integrity and meeting budget. Mary's accounting background has provided her the basis for continued skill development and the focused expansion of her responsibilities into accounting. It is time to recognize this shift in responsibilities as Mary has been fully performing accounting work for most of the last year.

B. Overall performance rating at last formal performance review

Date of Last Review: 3/27/2016

Did the employee receive a performance rating of “Successfully Meets Expectations” or higher on their most recent performance evaluation?  
☒ Yes  
☐ No

C. Job Classification/Career Development Recommendation

Which job classification (may be current or different) do you feel best matches the changes documented on this form?

Title: Accountant  
Jobcode: PBF1

This appears to qualify for:  
☐ Career Advancement  
☐ Promotion  
☒ Career Shift  
☐ No Change

Section 6 – Employee and Supervisor Electronic Signature

I agree that this represents a true and accurate documentation of the work being performed.

☒ Supervisor  
☒ Employee

Date: 12/5/2016

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Last updated 2/2017