Overview Agenda

• **Dean Colangelo** - Remarks and introduction of COE implementation team

• **Human Resources** - Dick See, TIER HR Project Lead & Vicky Smith, Organizational Redesign Consultant

• **Finance Shared Services** - Debby Zumbach, Asst VP and Director, Business Services

• **Change Management** - Sue Sager & Rachel Napoli, Organizational Change Administrators

• **Next Steps** - Chris Annicella, Emily Campbell, and Rob Posekany
HUMAN RESOURCE REDESIGN

Learn more at http://hr.uiowa.edu/tierHR
Evolution of Human Resources

- **Welfare Officer** (1890-1913)
  - Administrative focus
  - Compliance
  - Traditional mindset
  - Limited scope of activity
  - Specialized functions

- **Labor Manager** (1914-1939)
  - Administrative focus
  - Compliance
  - Traditional mindset
  - Limited scope of activity
  - Specialized functions

- **Personnel Management** (1945-1979)
  - Administrative focus with enlarged scope of activities
  - Support function
  - Less reactive & more proactive

  - Administrative focus with enlarged scope of activities
  - Support function
  - Less reactive & more proactive
  - Business Partner
  - Focus on value-added activities
  - Proactive
  - Multidisciplinary
  - Multi-faceted roles

- **Strategic HR** (2000 till now)
  - Business Partner
  - Focus on value-added activities
  - Proactive
  - Multidisciplinary
  - Multi-faceted roles

Key Events:
- **2nd Industrial Revolution**
- **World Wars**
- **Globalization**
Human Resources Redesign Case for Change

• 80% of current Unit HR Representatives (not including UI Health Care) spend on average 25% of their time (10 hrs./wk.) on their HR responsibilities.

• The work of HR Leaders and Representatives continues to evolve to be more complex and the inability to focus exclusively on their HR role can cause inefficiencies and limit effectiveness. The need for greater efficiency and effectiveness is at the heart of this redesign.

• Focus on having the right person in the right classification with the right responsibilities.

• Develop streamlined processes resulting in improved services.

• Need for full-time HR professionals to fill a more strategic role in supporting the core mission of the college/division.
Goals / Outcomes

TIER HR-01 Goals

- HR Reps doing 100% HR work
- HR Reps reporting to Senior HR Leader
- Senior HR Leader establishing a dual reporting relationship with VP of UHR while maintaining accountability to the Dean/VP of the college/division

Streamlined Processes

- Improved Efficiencies for Administrators
- Strategic HR Service Delivery
- Improved Services for Faculty, Staff, & Students
Welcome To University Shared Services
Why Shared Services?

- Developing transaction experts will result in higher accuracy, less rework and less risk.
- Transactions are processed more efficiently due to highly trained and dedicated customer representatives.
- Provide improved and consistent knowledge and expertise to campus.
- Reduce the need to complete 100% post audit of transactions.
- Allow departments and faculty to focus on their mission and spend less time handling transactions.

A Specialized and Dedicated Team = Increased Productivity for The University of Iowa Campus
What is Shared Services?

✓ Virtual centralized department of transaction experts
✓ Staff will be located close to their customers.
✓ Fully trained on all current practices and requirements to reduce rework and delays.
✓ Providing customer service that exceeds expectations.
✓ Involved in continuous quality improvement of processes
✓ Key Performance Indicators (KPI) are measured and monitored
✓ Quality feedback from customers.
✓ Opportunities to shape a new organization.
✓ Opportunities for promotion.
Transactional services for financial shared services include:

- Exclusive
  - procurement card reconciliation
  - travel expense vouchers
  - procurement requisitions
  - ebuy requisitions
  - eVouchers
  - Cash deposits

- Optional
  - request for travel
  - procurement card purchases
University Shared Services Benefits

- Dedicated staff, trained as experts in creating and reviewing transactions, will ensure compliance with university policies.
- Shared Services staff will serve as a knowledge-base and resource for departmental questions.
- Transactions will be “Right the First Time”, decreasing the need for rework and error correction.
- Improved turn-around times for payments to vendors, ordering, and reimbursements to staff.
Number of Shared Services positions needed is determined.

Eligible staff will be identified by guiding principles.

Meetings with eligible staff will provide background and understanding of opportunities.

Eligible staff will be offered the opportunity to volunteer.

Completion of staffing will be from defined and approved process.

Staff will retain current position title, salary and status.
Key Performance Indicators

**College of Education**

- **Average Time for Requests for Travel**: 8.34 Days
  - Creation: 1.66
  - Workflow: 6.68

- **Average Times for Travel Expense Vouchers**: 11.85 Days
  - Creation: 3.10
  - Workflow: 3.55
  - Central Processing: 5.20

**All Campus**

- **Average Time for Requests for Travel**: 4.79 Days
  - Creation: 1.13
  - Workflow: 3.66

- **Average Times for Travel Expense Vouchers**: 13.23 Days
  - Creation: 3.95
  - Workflow: 3.96
  - Central Processing: 5.32
Key Performance Indicators

College of Education

- Average Times for Procurement Card Vouchers:
  - Creation: 5.74 days
  - Workflow: 8.03 days
  - Central Processing: 1.97 days
  - Total: 15.74 days

1 Audit Error every 4.32 Travel Expense Vouchers
1 Audit Error every 2.99 Procurement Card Vouchers

All Campus

- Average Times for Procurement Card Vouchers:
  - Creation: 5.63 days
  - Workflow: 7.75 days
  - Central Processing: 3.22 days
  - Total: 16.59 days

1 Audit Error every 5.54 Travel Expense Vouchers
1 Audit Error every 6.66 Procurement Card Vouchers
Getting people ready, willing and able to work in new ways.

Your partners in navigating workplace change.

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Work Realignment

Employee Input

Leader Input

College Leadership Decision
Managing Transitions

William Bridges

Neutral Zone

Transition: the space between no longer . . . and . . . not yet
“Quake-Proof” Resilience

- Firm foundation
- Flexible when shaken

Establishing a firm foundation can help you remain flexible through the uncertainty of change.
Tips for Building Resilience

1. Take care of yourself
2. Stay connected with your support system
3. Notice how you are feeling. Make time to relax
4. Embrace the opportunity to learn something new
5. Try to maintain a positive attitude even if you are struggling
6. Set goals and celebrate when you achieve those goals
7. Look for ways to help others cope with change
## University Resources

<table>
<thead>
<tr>
<th>Services</th>
<th>Contact information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online Resiliency Toolkit</td>
<td>319-353-2973  <a href="http://hr.uiowa.edu/livewell/resilience">http://hr.uiowa.edu/livewell/resilience</a></td>
</tr>
<tr>
<td>UI Livewell Health Coach</td>
<td>319-353-2314  <a href="http://hr.uiowa.edu/livewell/">http://hr.uiowa.edu/livewell/</a></td>
</tr>
<tr>
<td>Employee Assistance Program Counselor</td>
<td>319-335-2056  <a href="http://hr.uiowa.edu/eap">http://hr.uiowa.edu/eap</a></td>
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<tr>
<td>On-site skill building seminars for work groups</td>
<td>319-353-2314  <a href="http://hr.uiowa.edu/livewell/">http://hr.uiowa.edu/livewell/</a></td>
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<tr>
<td>Self-care program for caregivers</td>
<td>319-335-1371  <a href="http://www.hr.uiowa.edu/family-services">http://www.hr.uiowa.edu/family-services</a></td>
</tr>
<tr>
<td>Office of the Ombudsperson</td>
<td>319-335-3608  <a href="http://www.uiowa.edu/~ombud/">http://www.uiowa.edu/~ombud/</a></td>
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<tr>
<td>UI Learning &amp; Development</td>
<td>319-353-2314  <a href="http://hr.uiowa.edu/">http://hr.uiowa.edu/</a></td>
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• Finalize Financial Shared Services staff eligibility.
• Supervisor and Chris A. meet with eligible staff member.
• Group meeting with eligible staff, supervisors, and TIER project implementation team members.
• Eligible staff will meet 1:1 with Finance Shared Services team.
• The HR project team will meet with staff who have significant HR responsibilities.
• Eligible staff will have the opportunity to volunteer (two week period).
• Completion of Finance Shared Service staffing will be determined by COE Implementation Team in collaboration with Finance Shared Services project team. Final decision is made by the Dean.
• Eligible staff will be notified of decisions.
• Workforce planning will begin through collaboration and input.