HCM Project Phase 3

Future HCM Service Delivery Model
Information Session #1

October 26, 2016
<table>
<thead>
<tr>
<th>Time</th>
<th>Topic</th>
<th>Facilitator(s)</th>
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<tbody>
<tr>
<td>3:30 PM</td>
<td>Welcome and Session Objectives</td>
<td>Julie S.</td>
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<tr>
<td>3:35 PM</td>
<td>Future HCM SDM Project Approach</td>
<td>Julie S.</td>
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<tr>
<td>3:40 PM</td>
<td>Future HCM SDM Governance Model</td>
<td>Julie S.</td>
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<td>3:50 PM</td>
<td>Future HCM SDM Guiding Principles</td>
<td>Julie S.</td>
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<td>4:00 PM</td>
<td>Future Responsibilities of Organizations Involved in Performing the HCM Processes</td>
<td>Chris</td>
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<td>4:10 PM</td>
<td>Sample HCM Service Delivery Model</td>
<td>Chris</td>
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<tr>
<td>4:15 PM</td>
<td>Your Role in the Future HCM SDM Review Process</td>
<td>Chris</td>
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<tr>
<td>4:20 PM</td>
<td>Questions and Answers</td>
<td>All</td>
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<tr>
<td>4:25 PM</td>
<td>Next Steps &amp; Wrap-up</td>
<td>Chris</td>
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The key to developing Penn’s Future HCM SDM involves focused work sessions with the HCM Steering Committee and other influential stakeholders throughout the University.

**Create Foundation for Decision Making**
- Develop Foundations Work Session materials using baseline data and external peer reviews
- Conduct Foundations Work Session(s)
  - Validate alignment of University-wide strategy with School/Center, Provost, DHR, DOF & ISC Objectives
  - Discuss Trends in HCM SDM
  - Develop HCM Guiding Principles
  - Agree on HCM Governance Model to manage process, technology and organizational change
  - Determine strategy for obtaining executive level commitment

**Analyze HCM SDM Options**
- Identify future HCM service level objectives (Performance Measurements)
- Conduct HCM SDM Options Work Session(s)
  - Automate vs. eliminate
  - In-source vs. outsource
  - Shared service vs. decentralize
  - Determine future responsibilities of organizations (Schools/Centers, Provost, DHR, DOF & ISC) involved in performing the HCM processes

**Develop Future HCM SDM**
- Develop “to-be” end-to-end HCM process vision
- Assess potential change impact to current organization structure
- Document where technology can improve baseline processes
- Identify high-level “to-be” HCM performance measures
- Conduct Future HCM SDM Work Session to agree on recommendations

We are here in our approach
Future HCM SDM Governance Model

Executive Leadership Team (ELT)
Office of the President, Office of the Provost & Office of the EVP

Steering Committee
- Jack Heuer (DHR)*
- Gary Truhlar (DHR)
- Trevor Lewis (Provost)*
- Tom Murphy (ISC)*
- MaryFrances McCourt (DOF)*
- John Horn (DOF)
- Tom Slavinski (DOF)
- Jeanne Curtis (ISC)
- Matt Lane (SAS)
- Marianne Achenbach (PSOM)
- Regine Metellus (SP2)
- Kim Hoftiezer (Lib)
- Gary Sorin (Interra)

*Project Sponsor

Change Management
- Change Lead: Gary Truhlar (DHR)
- Comms. Specialist: Stephanie Brown (DHR)
- Change Consultant: Don Saragnese (Interra)

Project Management & Coordination
- Functional Manager: Chris Blickley (DHR), Julie Shuttleworth (Provost)
- Technical Manager: Julie Meyer (ISC)
- Consulting Manager: Manny Ramirez (Interra)

HCM SDM Review Team
- TBD (HR Generalists, DHR, DOF, BAs)
- Consulting Lead: Don Saragnese (Interra)
- Manny Ramirez (Interra)

Requirements Definition & Software Selection Team
- TBD (HR Generalists, DHR, DOF, BAs)
- Consulting Lead: Tim Regan (Interra)

Extended Team Members

Process & Technology Improvement Team(s)
- TBD – Project Team Leads
- TBD – Team Members (HR Generalists, DHR, DOF, BAs)
- Oversight:
  - Julie Meyer (ISC)
  - Tim Regan (Interra)
## Future HCM SDM Guiding Principles

<table>
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<tr>
<th>Guiding Principle</th>
<th>Example</th>
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<tr>
<td><strong>Think “One Penn”</strong></td>
<td>• Do what is best for the University, not just for one school or center.</td>
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<td>• Be transparent, collaborative and inclusive.</td>
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<td><strong>Adopt, Don't Adapt</strong></td>
<td>• Change the HCM process, not the software – (Any HCM software customization should deliver 10x value to cost).</td>
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<tr>
<td><strong>Keep It Simple</strong></td>
<td>• Minimize the HCM data entry and modifications of the same information and shared data fields in multiple systems.</td>
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<td>• Utilize one HCM technology to enable efficient and uniform processes University-wide.</td>
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<tr>
<td><strong>Be Accountable</strong></td>
<td>• Every HCM data source, process, procedure, and policy requires an owner.</td>
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<td><strong>Strive for Clarity</strong></td>
<td>• Agree on consistent HCM terms such as headcount or employee transfers.</td>
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<td><strong>Innovate and Improve</strong></td>
<td>• Consider new approaches and ideas.</td>
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<td>• Continuously monitor and measure HCM services for quality and efficiency, and take corrective action, if needed.</td>
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The HCM Project will establish responsibilities and working relationships of Schools, Centers, Division of Human Resources, Division of Finance, Provost, Information Systems & Computing and the HCM Steering Committee in order to provide more effective HCM services to faculty, staff, student workers and guests.
Sample Service Delivery Model

HR / Payroll Center of Excellence

- Business strategy alignment
- Workforce planning
- Career and succession management
- Organization development & learning
- HR / Payroll policy development & updates
- Compensation planning
- Benefits planning

HR / Payroll Strategy

HR / Payroll School / Center leadership

- Employee & labor relations
- Coaching & counseling
- Needs assessment/diagnosis
- Recruitment strategy & administration
- HR business planning & support
- Performance management administration
- HR / Payroll systems transactions
- Labor distribution
- Budgeting & reporting

HR / Payroll School / Center Self-Service (Internet & Mobile)

- Time & attendance / scheduling
- Employee profile maintenance
- Benefits enrollment / changes
- Compensation administration
- Requisitions & job postings
- Performance management

Schools / Centers

- Call center support
- Payroll processing
- Payroll tax and accounting
- Relocations
- Benefits administration
- Recruiting strategy and administration
- Employee assistance programs
- HRMS Support
- Vendor Integration / Management
- Compliance & Reporting
- HR / Payroll Policies & Procedures Maintenance

Third-Party Administration & Delivery

Employees & Managers

HR / Payroll Shared Services

interra Consulting

University of Pennsylvania

Future HCM SDM Information Session #1 – October 26, 2016
Your Role In the Future HCM SDM Review Process

- Attend the Two Scheduled Future HCM SDM Review Information Sessions or Send a Designee in Your Place. (You will receive an email invitation for the December 7th Session shortly.)

- Share the Information From this Session with Subject Matter Experts in Your School or Center.

- For More Information on the HCM Project, Please Direct Your Subject Matter Experts to Visit Our Website at www.hr.upenn.edu/hcm.

- Take the Output of the HCM Steering Committee’s Work that Will Be Provided From the December 7th Information Session and Review with Your Subject Matter Experts. Provide the HCM SDM Project Team with Feedback on How the Future HCM SDM Works (or Doesn’t Work) for Your Organization by December 14th.
Next Steps and Wrap-up – Future HCM SDM Work Sessions

Aug 8 – Sep 9
Create Foundation for Decision Making

Aug 10th

Aug 8 – Sep 9
Analyse HCM SDM Options

Sep 8th

Sep 12 – Oct 21
Develop Future HCM SDM

Sep 29th

Oct 12th

Oct 24 – Nov 18

Oct 24

Nov 10th

HCM SDM Review Team Info Session #1
Oct 26th

HCM Service Delivery Model
- To-Be end-to-end HCM process vision
- Key To-Be HCM Organizational Roles & Responsibilities
- High-level “To-Be” HCM performance measures
- Change impacts to current organization structure

Scheduled future work sessions

Our next HCM SDM Review Team information session will be held on December 7th.