Human Capital Management Project

Phase 3 Summary

September 13, 2016
Phase 3 Summary – Objectives & Scope

The objectives of Phase 3 include the following:

- Provide an integrated people, process and technology vision for how HR and Payroll services are to be delivered in the future – HCM Service Delivery Model (SDM)
- Prepare for the implementation of the future HCM SDM by developing requirements, evaluating and selecting software vendors and service providers, creating a business case for implementation and building a high level implementation roadmap
- Continue to make process and technology improvements that have immediate impact with minimal investment or can be carried over to the future SDM

The scope includes all employees including faculty, staff and student workers for the following HR/Payroll functions/processes:

- Recruiting (Sourcing and Applicant Tracking)
- Onboarding
- Core HR Administration (Hires, Rehires, Status Changes, Transfers, Promotions and Terminations)
- Health and Retirement Benefits Administration including ACA
- Compensation (Planning and Administration)
- Time and Attendance (Scheduling, Time Capture & Reporting, PTO Accruals)
- Payroll (Gross Comp-to-net & Pay Employee)
- Labor Distribution
- Reporting & Workforce Analytics
- Learning (Curriculum Development & Delivery)
- Learning (Training Administration)
- Talent Management – Workforce Planning
- Talent Management – Performance Management
- Talent Management – Succession Planning
- Employee Health & Safety
- Employee and Management Self-Service
- Labor Planning and Forecasting
- Effort Reporting
- Position Management and Organizational Hierarchy
Phase 3 Summary – Timeline

Jul ‘16 Aug ’16 Sep ’16 Oct ’16 Nov ’16 Dec ’16 Jan ’17 Feb ’17

0.0 Phase 3 Prep
Aug 8 – Nov 18
1.0 Future State HCM Service Delivery Model
Sep 5 – Dec 2
2.0 HR / Payroll Requirements Definition

Engage HCM Vendors

Nov 14 – Feb 10
3.0 Vendor Evaluation / Selection

Jul 11 – Aug 5
Dec 12 – Feb 24
4.0 Implementation Roadmap

Jul 11 – Feb 24
Dec 12 – Feb 24
5.0 Draft Business Case

Jul 11 – Feb 24
6.0 Process & Technology Improvements

Jul 11 – Feb 24
7.0 Change Management

We are here
Penn Compact 2020
- Inclusion
- Innovation
- Impact

University-wide Objectives
- Schools & Centers
- Provost
- DHR

DOF
ISC

People

Process

Technology

HCM Service Delivery

Faculty & Staff
Supervisors
Schools & Centers

The Human Capital Management Service Delivery Model (HCM SDM) is driven by...

...University-wide strategies and School/Center, Provost, HR, Finance & IT objectives and...

...selecting the optimal combination of people, processes, and technology.

The HCM SDM focuses on meeting the needs of its three customers; Faculty & Staff, Supervisors and Schools & Centers.
Phase 3 Summary – HCM Service Delivery Model Approach

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 levels objectives
- 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” target performance levels by process and align with HCM service level objectives
- Conduct Future HCM SDM Work Session to agree on recommendations