Human Capital Management Transformation Initiative

*Town Hall*

Houston Hall, Hall of Flags

June 27, 2017
What is Human Capital Management?

Human Capital Management (HCM) represents the end-to-end processes related to managing people resources and support core functions.

- Recruitment and Hiring
- Personnel Administration
- Benefits
- Compensation
- Payroll
- Time Management
- Faculty Administration
- Talent Management
The Human Capital Management Transformation Initiative will improve Penn’s HCM-related processes using Workday as a foundation.

1) Shift from administrative/data entry tasks to enhanced consultative and strategic support

2) Create an integrated, modern system that increases access to data and allows for informed decision-making

3) Simplify and standardize processes

4) Provide support through new service delivery team and alignment of central, school, and center activities
Guiding Principles

♦ Think “One Penn”
♦ Adopt, Don’t Adapt
♦ Keep It Simple
♦ Be Accountable
♦ Strive for Clarity
♦ Innovate and Improve
Our Approach

♦ Inclusion
♦ Transparency
♦ Remember the customer experience
♦ Two-way communication
Current Systems Architecture

Town Hall, June 2017
The new environment will be less complex, more stable, lower cost, and will enable improved processes.
Timeline

Phase 1: Oct. 2015 - Process Mapping & Analysis

Phase 2: Jan. 2016 - Trustee Approval, Vendor Negotiations & Planning

Phase 3: Jan. 2017 - HR & Payroll Operations Baseline

Phase 3A: July 2017 - Operations Baseline

Phase 4: July 2017 - Service Delivery Model, Requirements, Evaluation & Selection

Plan & Architect through Jan. 2018
Software Demonstrations
Phase 4 Milestones

- **Plan & Architect**: July 2017
- **Wave 1**: January 2018
  - Service Desk 1.0 Live
- **Wave 2**: January 2019
  - Workday Wave 1 Live
- **Wave 2**: January 2020
  - Workday Wave 2 Live
Future HCM Service Delivery Model – HCM Tiered Delivery Concept

**Tier 0**
Employee and Manager Self-Service
- Interactive Voice Response (IVR)
- Portal

**Tier 1**
Customer Service Reps
- Provides employee support, processes simple transactions
- Handles FAQs
- Conducts basic research

**Tier 2**
Subject-Matter Experts
- Provides complex solutions and transactions
- Administers policy
- Conducts in-depth research
- Resolves issues

**Tier 3**
Strategists
- Develops policy and strategy
- Provides policy interpretation, operational oversight
- Conducts employee satisfaction surveys

% of Contacts:
- Tier 0: 80%
- Tier 1: 18%
- Tier 2: 2%
- Tier 3: 2%

Analysis
What is Workday?

♦ Cloud-based integrated system that manages HR, payroll, and other HCM-related processes
♦ Enterprise-class security with 24/7 access to information
♦ Modern, agile technology
♦ Real-time analytics and user friendly

Other members of the Workday higher education community:

Brown ● Yale ● Cornell ● NYU ● University of Chicago ● USC ● Georgetown ● and more
Key Facts

♦ Population of Workday for Wave 1 limited to:
  • Faculty/Staff/Affiliated workers (temps, students workers, etc.)
  • Those who have HCM roles (e.g., managerial responsibilities)

♦ Review for Wave 2 will be done for LMS learners (UPHS, students)

♦ Pay cycles will continue to be weekly and monthly
The HCM Transformation Initiative Team
HCM Initiative Structure

Program Management Office (PMO)

Program Manager
M. Ramirez

Functional Manager
C. Blickley

Functional Manager
J. Shuttleworth

SI Program Manager
N. Thanjan

Technology Manager
J. Meyer

Sponsor Group
J. Heuer    M. McCourt
T. Lewis    T. Murphy

Steering Committee
M. Achenbach
A. Allen
J. Curtis
B. Friedman
K. Hoftiezer
J. Horn
M. Jost
M. Lane
J. Lowry
C. Masotti
R. Metellus
H. Sands
T. Slavinski
G. Truhlar
G. Sorin (Interra)
K. Karich (Deloitte)
S. Rochette (Workday)

Penn Organizations for Consultation
- OGC
- Audit

School / Center Process Owners

HCM Service Delivery Team

Functional Team

Technical Team

Change Management Team

A

B

C

D
How You Can Support HCM

The HCM Transformation Initiative is a major commitment by the University.

We need your involvement and support to be successful.

- Think “One Penn”
- Adopt, Don’t Adapt
- Innovate and Improve
Q&A
Stay Up to Date with HCM

Website
www.hr.upenn.edu/hcm

Email
hcm-announcement@upenn.edu