

Improved Service Delivery at ISU: Overview of Proposed Models for Human Resources and Selected Finance Services

Institutional Effectiveness Leadership Team (IELT)

Campus Feedback Sessions

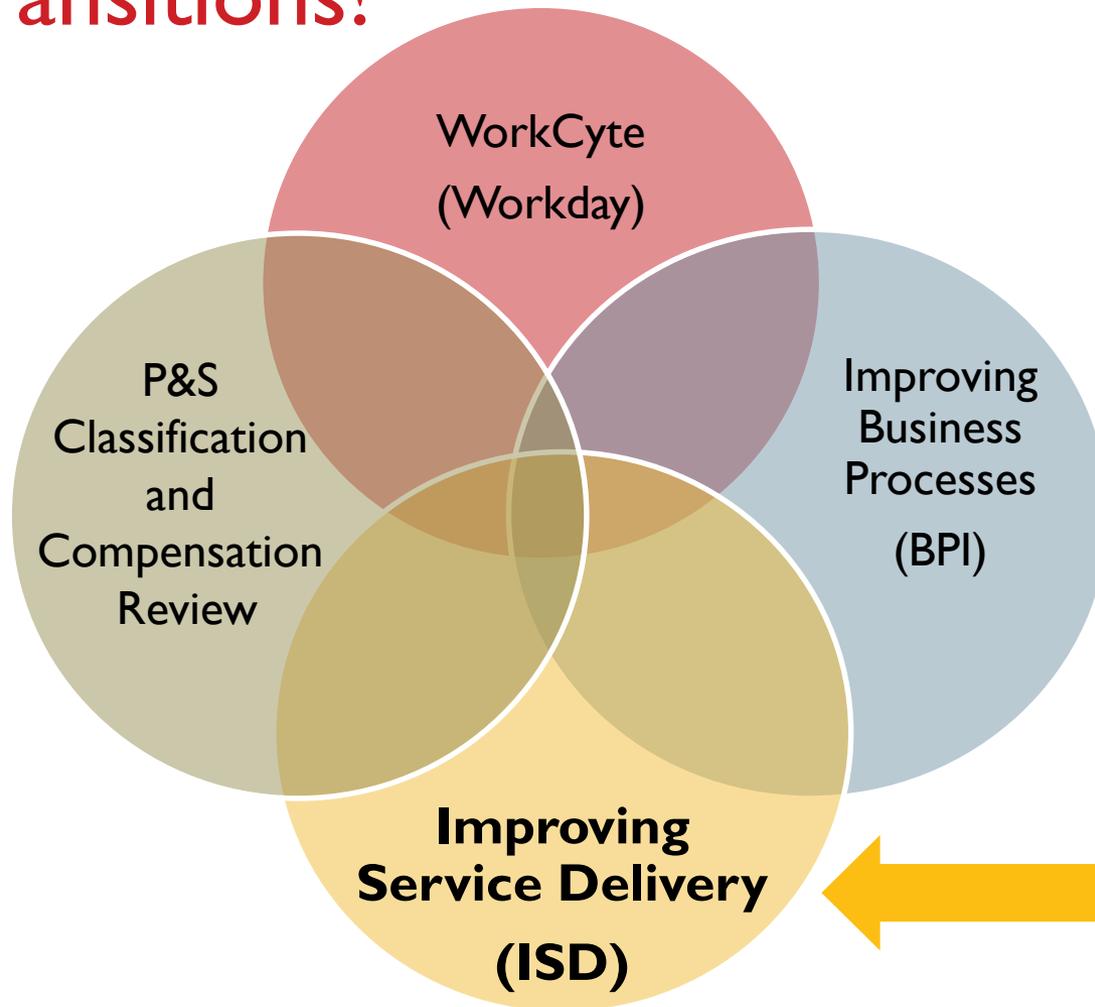
October 2018

Today's discussion

- **Context** for proposed changes
- **Proposed models** for delivering human resources (HR) and selected finance services
- **Transitioning** to new models
- **We want your feedback!**
 - What works, concerns, questions
 - Now or online (your name and email are optional)

<https://www.workcyte.iastate.edu/FAQs/questions-feedback>

The entire campus is experiencing a lot of transitions!



TODAY
How might staff be organized to support services with Workday and updated business processes?

Why improved service delivery, and why now?

- We are fortunate to have exceptional staff, faculty and administrators and we value the work you do
- The transition to Workday provides an opportunity to redesign how we deliver services in Human Resources and Finance, building on our employees' strengths
- Our goals in developing improved service delivery are to:
 - Improve the employee experience
 - Better support the missions of Iowa State and our units
 - Enhance our culture of service
- We are committed to a collaborative, supportive process as we work through these changes

What are the new approaches?

- Services in HR and Finance are more effectively provided by employees who are experts in these areas, i.e., **functional specialists**
- We **propose** new organizational structures, i.e., **improved service delivery models** which will:
 - Allow functional specialists to work in teams
 - Ensure supervisors are knowledgeable, understand the new roles and can provide guidance
 - Offer enhanced professional development opportunities
 - Provide better balance of workloads and more effective backup
- We will work collaboratively with **staff impacted** by these new approaches

Institutional Effectiveness Leadership Team (IELT) and Super Group

The IELT Super Group is responsible for making a recommendation on the Finance and HR service delivery models. This group combines representation from Faculty Senate, P&S Council, Department Chairs and Workcyte Program Sponsors.

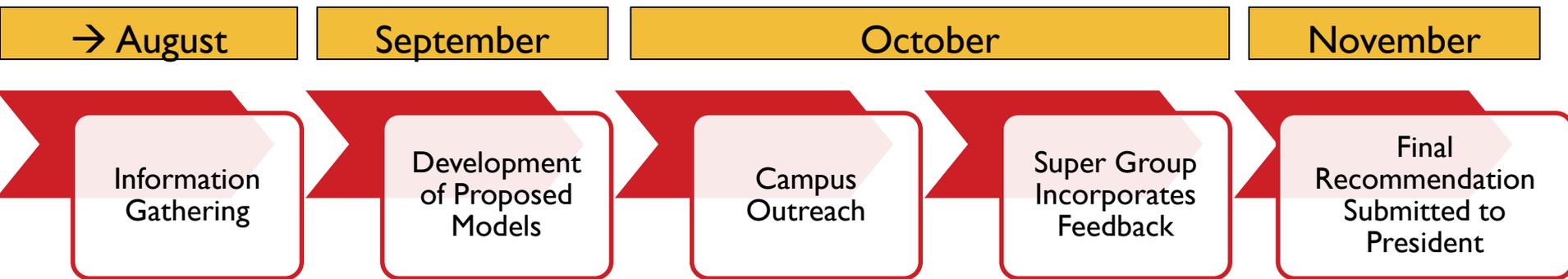
Institutional Effectiveness Leadership Team (IELT) Members:

Pam Elliott Cain	John Lawrence
Kristen Constant	Sarah Nusser
Kristi Darr	Beate Schmittmann
Martino Harmon	Jonathan Wickert

Super Group is composed of IELT and the following:

Stacy Renfro	Peter Martin
Chad Gasta	

Improved Service Delivery Model Development



Summary of Improved Service Delivery Changes

What's Changing...

- An enhanced service structure with new reporting relationships will be developed
- The focus is to strengthen our culture of service, accountability, and consistent performance standards across Iowa State
- Specialized staff will be focused in HR and Finance
- Some modifications of position responsibilities for administrative staff will occur

What's Not Changing...

- Units will continue to be served by staff who understand unit specific needs
- Units will continue to augment training, communications, and programs developed by HR and Finance with a unit-specific focus to ensure customized support
- Units will continue to have administrative support
- Units will provide feedback for continuously improving service delivery

Service Delivery Model Reporting Relationships

- Solid Line
 - Denotes supervisory relationship (Manager Security Role in Workday)
 - Leads performance and compliance management
 - Acts as hiring manager
 - Coordinates backup and workload balancing
 - Ensures culture of service and accountability is upheld
- Dotted Line
 - Helps define performance management criteria
 - Contributes to and consulted in annual performance evaluation
 - Involved in Hiring
 - Ensures culture of service and accountability is upheld
 - Provides input and feedback in the development of policies and procedures
 - Provides day-to-day operational direction to support unit needs and mission

Enhancing our Culture of Service and Accountability

Reporting relationships alone will not transform the HR and Finance services. ISU is committed to enhancing our culture of delivering high quality support and customer service



- Customized and Consistent Training. Training plans will focus on:
 - Customer Service
 - HR/Finance Policies
 - Workday business processes and reporting



- Transparent Performance Metrics
 - Workday provides dashboards to monitor performance metrics e.g., time to complete Workday transactions
 - Proposed structure provides process to address issues in a timely and effective manner

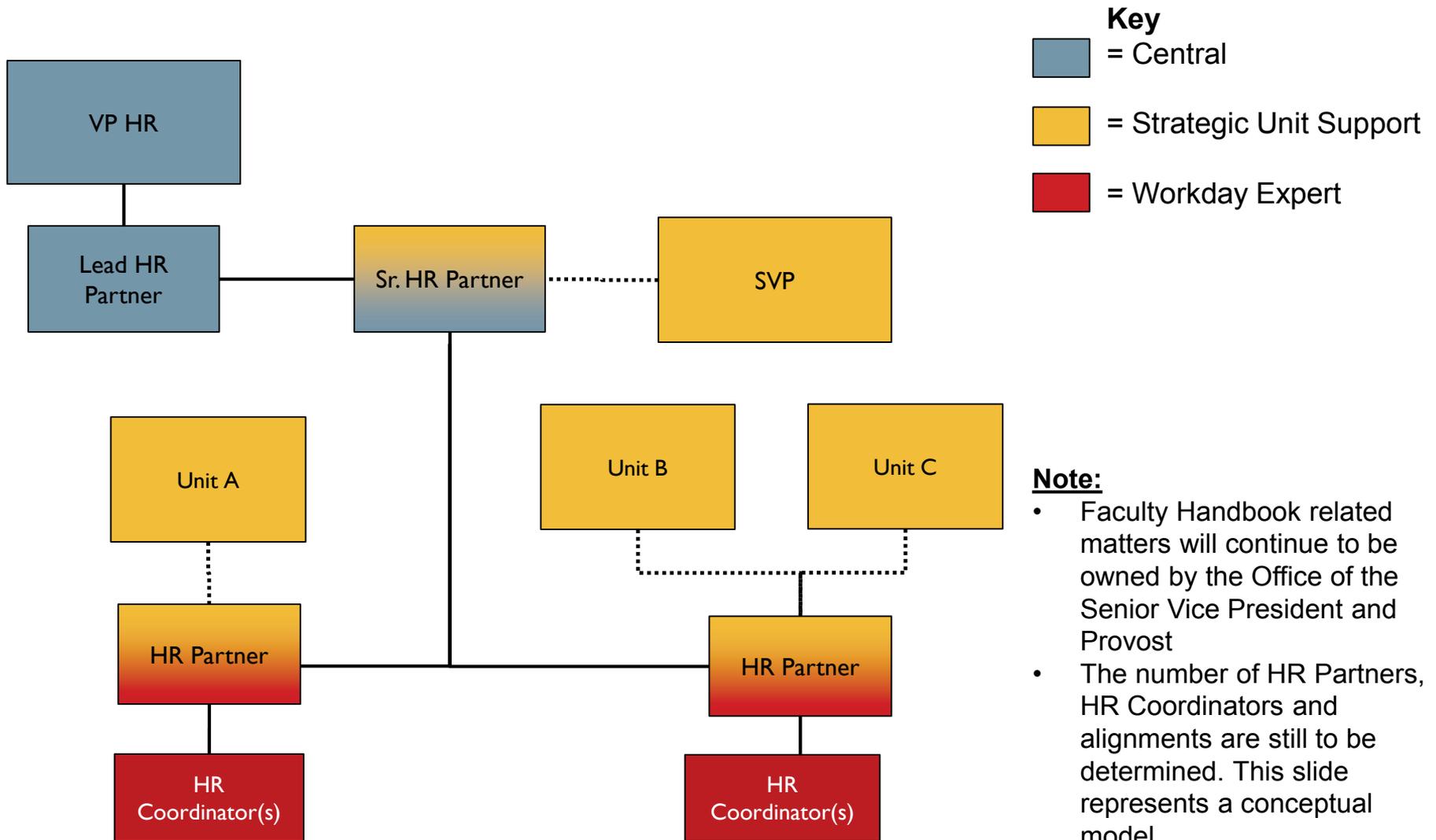


- Collaboration and Support
 - Specialized teams will support each other with knowledge sharing and cross training
 - Specialized teams will allow for backfill support when a staff member is out of the office or experiencing an increase in workload

IOWA STATE UNIVERSITY

Proposed HR Service Delivery Model

Proposed HR Service Delivery Structure



Summary of HR Services

University HR

- Create and maintain Human Resources strategy, policy and programs
- Develop core training and communications to be executed by Division HR teams

Sr. HR Partner

- Partner with UHR and Division head to ensure optimal customer service is delivered
- Provide guidance and development to Division HR teams

HR Partner

- Provide consultative and strategic HR support
- Engage with aligned units to address their unique needs
- Implement and execute HR strategies, programs, and services
- Ensure unit workforce strategy aligns with university goals

HR Coordinator

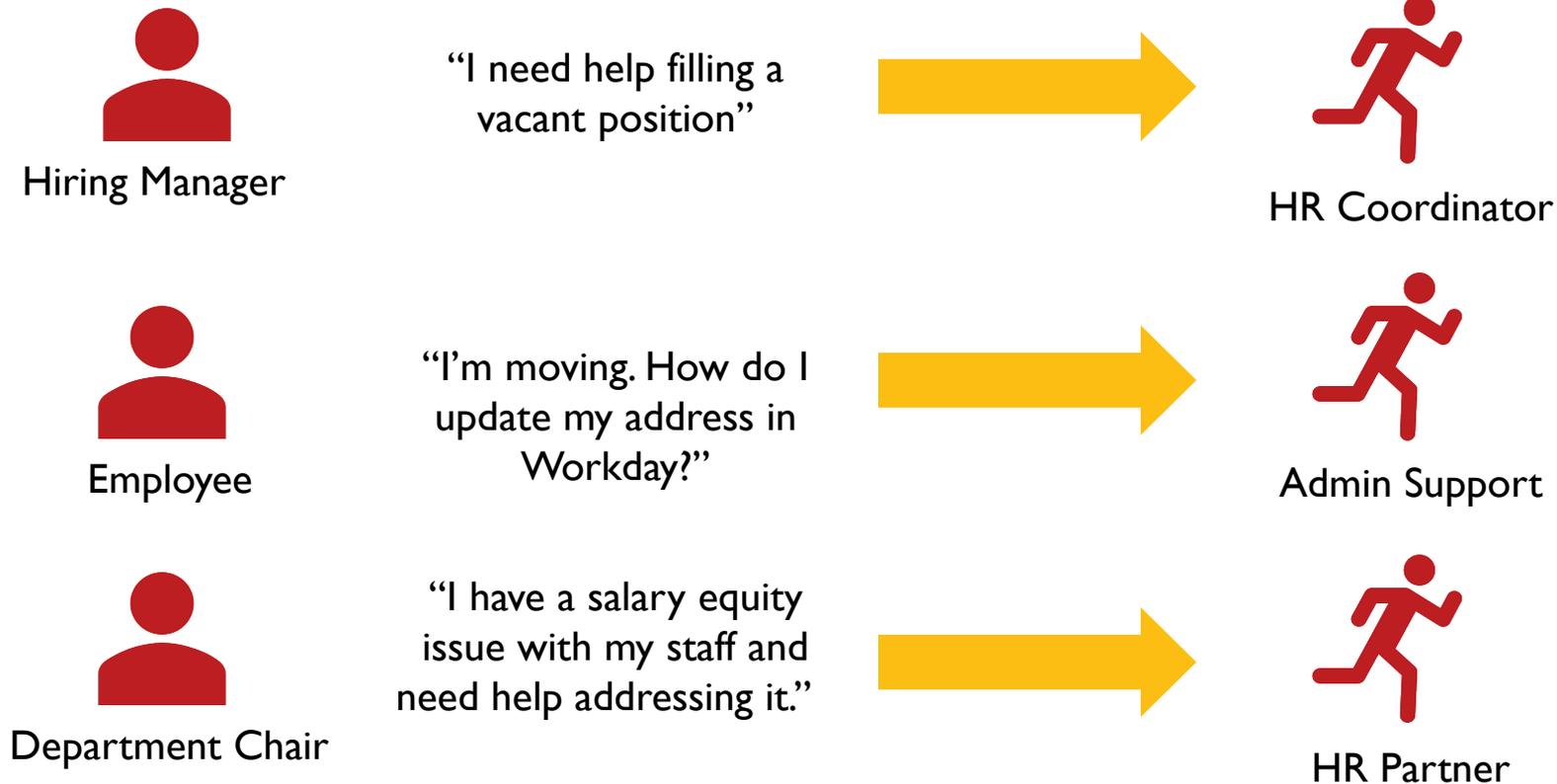
- Advise and support Workday processes and reporting for aligned unit
- Address HR transaction-related questions
- Ensure data integrity

Admin Support

- Resolve higher volume, general employee and manager inquiries
- Support employee and manager self-service Workday transactions
- Other administrative responsibilities, based on unit needs

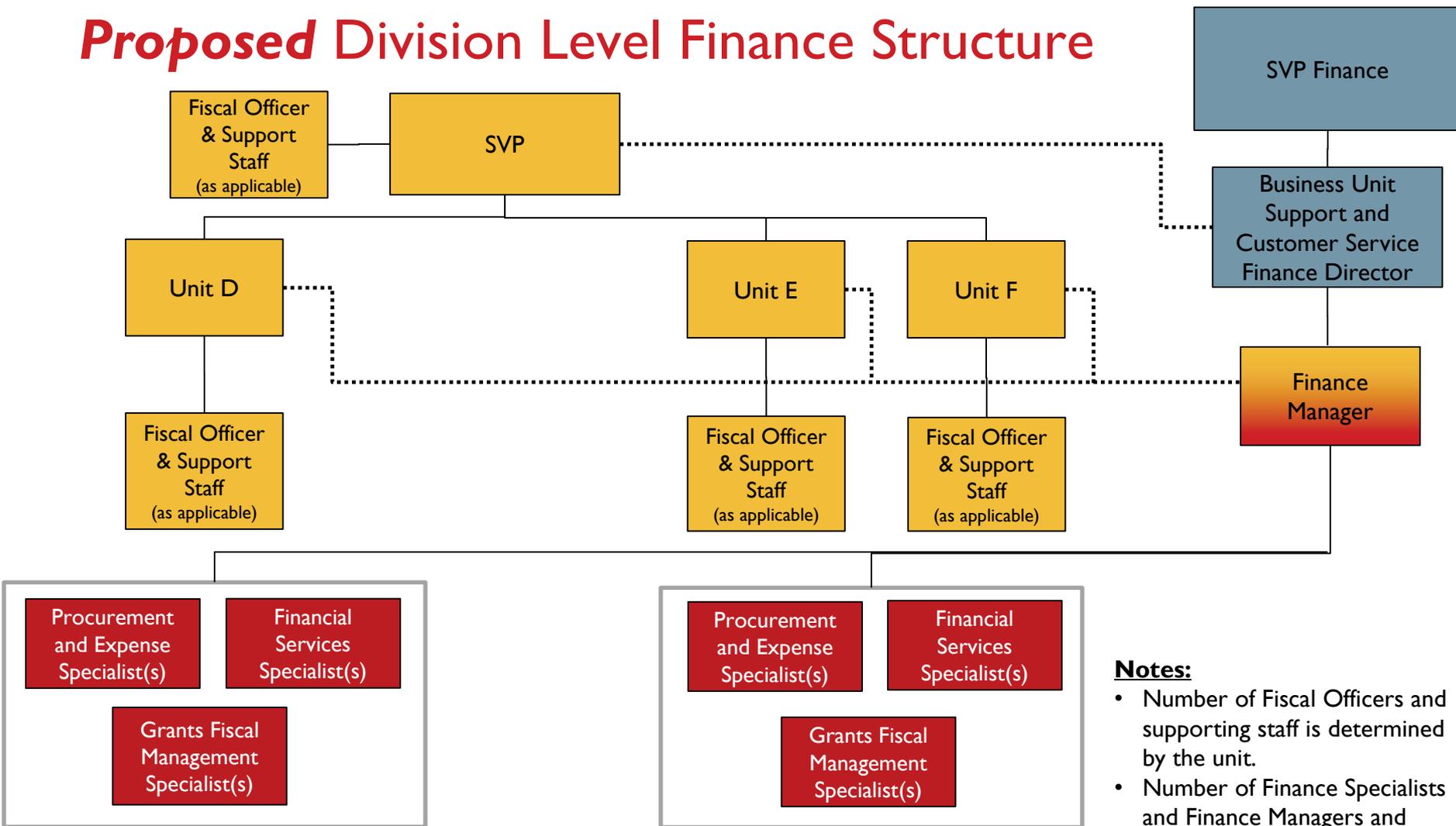
Example HR Scenarios

A critical component of the proposed model is the importance of the domain experts (specialists) assigned to each unit as a point of contact fostering unit-specific expertise and familiarity.



Proposed Finance Service Delivery Model

Proposed Division Level Finance Structure



Notes:

- Number of Fiscal Officers and supporting staff is determined by the unit.
- Number of Finance Specialists and Finance Managers and alignments is still to be determined. This slide represents a conceptual model

Key

= Central
 = Strategic Unit Support
 = Workday Expert

Summary Finance Services

Division of Finance

- Establishes accounting policies and procedures
- Resolves or investigates complex accounting issues
- Responsible for institution-level finance transactions and reporting

Unit Finance

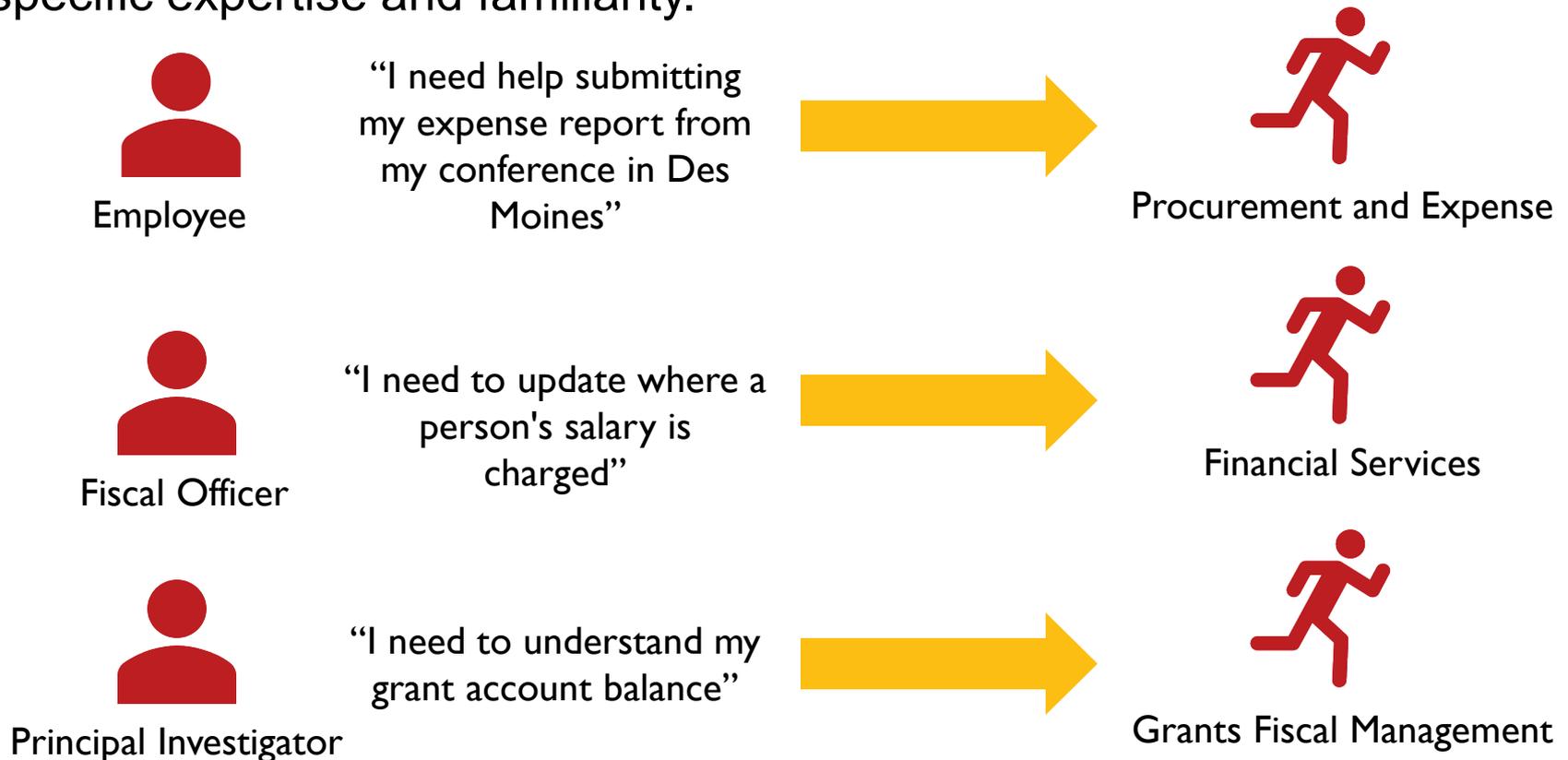
- Responsible for unit budget planning and analysis
- Oversees the unit's financial health, reporting, and staff financial training and development

Specialist Teams

- Initiate various financial transactions in Workday (e.g. travel reimbursements, equipment purchases, grant expenses)
- Prepare and analyze various reports to inform decision making for unit(s) served
- Address Finance transaction-related questions

Example Finance Scenarios

A critical component of the proposed model is the importance of the finance specialist teams aligned with each unit as a point of contact fostering unit-specific expertise and familiarity.



IOWA STATE UNIVERSITY

Transition Strategy

IOWA STATE UNIVERSITY

Guiding Principles

- Build on knowledge and expertise of current staff
- Keep knowledge and expertise aligned with units
- Minimize disruption for staff and units served
- Follow a collaborative and supportive process, involving affected staff and unit leaders

Transition to functional specialist positions

- Develop position descriptions (PDs) for new functional specialist roles
- Provide opportunities for staff to learn about new roles and ask questions
- Offer staff opportunity to express interest in these roles
- Conduct conversations with staff and unit leaders to identify talent pool for new functional specialist roles
- Recruit for remaining positions
- Conduct training
- Complete by July 2019, in time for Workday go-live

Alignment of remaining positions

- Meet with staff not moving into specialist roles to:
 - understand current work and skill sets
 - discuss opportunities and answer questions
- Meet with unit leaders to identify unit needs
- Conduct conversations with staff and unit leaders to match staff skills and interests with unit needs
- Update position descriptions
- Begin realignment in Spring 2019 and complete in FY20

Support Resources

- Employee Assistance Program 1-800-327-4692
Representatives are available 24/7
- Utilize courses from Lynda.com such as
 - For Employees
 - [Coping with Change](#)
 - [Why we dislike change](#)
 - [The Change Curve](#)
 - [Know your thought processes](#)
 - [How to plan for change](#)
 - [How to develop mental toughness](#)
 - For Managers
 - [Managing Organizational Change for Managers](#)
- Need someone to listen as you process the changes
 - Visit with [UHR Employee and Labor Relations staff](#), [your HR Liaison](#), or the [University Ombuds](#).

Support Resources

- Visit the ISU WellBeing website (www.wellbeing.iastate.edu) for additional resources
- Connect with resources in the [Adventure2](#) Program regarding stress management strategies
- Sign up for an [ISU Workshop](#) on change or stress management – more classes being added soon

Concluding thoughts

- We are fortunate to have exceptional staff, faculty and administrators and we value the work you do
- Improved service delivery will help us to:
 - Improve the employee experience
 - Better support Iowa State's mission
 - Enhance our culture of service
- We are committed to a collaborative, supportive process as we work through these changes
- In this presentation, we shared ***proposed*** models
- Your feedback is important! Please share your questions, comments and concerns

Questions? Comments?

- You can find more information at the WorkCyte website and in our FAQ
- Please provide feedback at:
<https://www.workcyte.iastate.edu/FAQs/questions-feedback>
- You can leave the name and email fields blank