UNIVERSITY UPDATE

1. 2019 Legislative Session
2. Federal Government Shutdown
3. Workday
4. Improved Service Delivery
   • Job Showcase
   • Leadership Hires
   • Employee Interest Survey
   • Transition Leadership, Timeline, Teams
WorkCyte Update

• Unified Milestones
  • Coordinating ISD and WorkCyte
    • January 4th (overall staffing levels) \DONE!
    • February 15th (configuration freeze date)
    • March 1st (names in roles)

• Testing Payroll Parallel testing – compare 6 payrolls in ADIN/ Workday

• Training (Pilot March, Begin April)
  • 56 in development
    • Instructor-Led (19 courses)
    • Computer-Based (37 Courses)

• Readiness – 60 workshops in 4 months
  • January (13), February (11), March (21), and April (15)
  • Posted on WorkCyte website
IMPROVED SERVICE DELIVERY

- Job Showcase
  - >600 attendees

- Heather Paris, Associate Vice President for Finance and Support Services

- Finance Model approximate staffing levels:
  - ~125 FTEs
    - 3 Finance Managers
    - ~3 to 4 Assistant Finance Managers
    - Remaining FTEs split roughly three ways among Finance Specialists, Procurement and Expense Specialists, and Grants Finance Specialists
ISD Updates & Transition Teams

January 10, 2019
ISD Updates & Announcements

Interest Survey
• The interest survey was sent out to all over 4,000 P&S and Merit employees on January 9th
  • As of 5 pm on the 9th we have 410 responses, 72 said yes, 46 said maybe, and 292 have said no

New AVP for HR
• Dwaine Heppler has accepted the position of AVP for Human Resource Services and Strategy

Transition Team Management & Coordination
• Stephen Simpson, Director, Environmental Health and Safety will help lead and coordinate the Transition Teams with the support of Leslie Ginder from UHR and the ISD project team
Transition Teams

Transition Teams are designed to make sure there’s enough people involved in the ISD transition to provide a personal touch for the organization and the employees impacted, as well as keep the process moving.

Focus on ISD impacts in the departments and colleges and align with University’s organizational structure

- Address remaining responsibilities from staff who are taking ISD positions
- Identifying new responsibilities for Staff remaining in the departments where finance and HR responsibilities may be reduced
Transition Team Selection

Transition Teams may be made up of 5 to 6 representatives from the respective division, college, or department and 1 to 2 HR and finance representatives.

Selection Criteria

- Team members need to have a **good understanding of the college or major unit’s mission and the detailed operations**
- Team members should be **able to remain neutral**
- Team members should have a **history of creative problem solving**
- Team members need to be **excellent communicators** that can navigate organizational politics and help build consensus

Co-Chairs

- One *department/college/division* representative will co-chair the transition team with the HR representative
Transition Team Responsibilities

Transition Teams will...

1. Meet with impacted employees & supervisors
2. Document impacted responsibilities
3. Identify and present solutions
4. Track Individual Transition plans

They will not...

Make decisions about people’s responsibilities or reorganize departments/units.

They are expected to present solutions to the appropriate leaders for final decision making.

Determine staffing for ISD service teams. Staffing the service teams is the responsibility of HR and Finance.
Leadership & Transition Teams

Following the existing university structure, senior leaders will select their
1. Transition Team members
2. Leadership team

Transition Team
- Meet with Employees & Supervisors to document impacted responsibilities on transition plan
- Present transition plans and potential solutions to leadership teams

Leadership & Transition Team Meeting(s)
- Leadership Team
- Makes final determination on individual transition plans
- Monitor and manage transition plans for individuals

Through July 1st
Transition Team Meetings

1. Meet with impacted Employees & Supervisors

Employees
- **Entering ISD**
  - Document “other” responsibilities
  - Track onboarding and transition of responsibilities

- **Impacted by ISD**
  - Document impacted Finance and HR responsibilities that will create **capacity**
  - Track transition of responsibilities

Supervisors
- **Review Transition Plans**
  - Review department’s transition plans
  - Discuss potential solutions
  - Continuous dialog and tracking

Match **other** with **capacity**
Transition Teams

2 Document impacted responsibilities

Transition Teams will create Individual Transition Plans used for documenting and tracking transition items like those listed below.

- Onboarding
- Training Plans
- Technology
- Office Space
- Year end responsibilities
- Transition dates
- Realigning responsibilities
- Coverage for unit responsibilities
- And more....

Transition Teams will have tools and resources for guiding the conversation and assisting in creating a transition plan.
Transition Teams

3 Identify and present Solutions

Transition Teams will:
• Work with employees and supervisors to think through transition solutions
• Document potential solutions
• Present their ideas to the department or college leadership

Impacted by ISD

Entering ISD

Match other responsibilities with future capacity

College or Department leadership will make all final decisions and are responsible for their respective areas
Transition Tracking

4 Track Individual Transition Plans

- Has the employee been met with?
- Are impacted responsibilities documented?
- Does the employee have an onboarding plan?
- Does the employee have a training plan?
- Are impacted responsibilities accounted for? By whom?
- Is there agreement on responsibility transition dates?
- Have funding impacts been documented?

Individual Transition Plans will be summarized for each Division, College or Department for tracking overall transition timeline and completion.
ISD Overall Timeline

- **January 4 – 11**
  - Transition Team Members Selected

- **January 9 – 18**
  - Employee interest survey for all P&S and Merit staff
  - Interest survey closes at 5 p.m. January 18

- **January 14-18**
  - Transition Teams announced

- **January 21 – 25**
  - Initial review of interest survey results and interest matrix

- **January 21 – March 1**
  - Meetings with employees to discuss interest and qualifications for ISD positions
  - Employees final decision by March 1

- **January 21 – April 1**
  - Transition Teams meet with finance and HR employees to develop individual transition plans, and work with supervisors to assist with realigning responsibilities
  - Workday user acceptance training, March 1 - 12

- **April 1 – June 30**
  - Workday training
  - Transition Teams assist with implementation of individual transition plans

- **July 1**
  - ISD and Workday go-live, service team member responsibilities
Transition Teams – Timeline & Monthly Commitment

- **January (~ 12 hours)**
  - Selection of team members identified for each area
  - Co-Chairs attend an introductory training session
  - Introduction of responsibilities and associated transition plan tools and resources
  - Set meeting schedule and pace
    - Bi-weekly 2-hour meetings starting the last week of January
  - Start meetings with impacted employees and completing Individual Transition Plans

- **February (~ 20 hours)**
  - Continue meetings with impacted employees and supervisors completing Individual Transition Plans
  - Document and identify early impact concerns with Transition Team

- **March (~ 25 hours)**
  - Continue meetings with impacted employees and supervisors completing Individual Transition Plans
  - Complete meetings with ISD selected employees
  - Combine Individual Transition Plans for global impact analysis on divisions, departments, and colleges

Co-Chairs training January 17th
Transition Teams – Timeline & Monthly Commitment

- **April (~ 25 hours)**
  - Outline potential solutions for transitioning responsibilities to remaining staff
  - Continue meetings with impacted employees and supervisors completing Individual Transition Plans
  - Meet with senior leadership to outline the global impacts and present solutions

- **May (~ 25 hours)**
  - Continue meeting with senior leadership to outline the global impacts and present solutions
  - Meet with employees and supervisors to discuss potential solutions and finalize Individual Transition Plans

- **June (~ 25 hours)**
  - Meet with employees and supervisors to discuss potential solutions and finalize Individual Transition Plans
  - Monitor Transition Plan implementation and help ensure transition are completed prior to June 15th

- **July (~ 15 hours)**
  - Follow-up with any outliers, or uncompleted transition plans
Questions?

Contact Stephen Simpson or Kristi Darr

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