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TOMORROW

SET HR Discovery & Prioritization

Findings & Prioritization Discussion
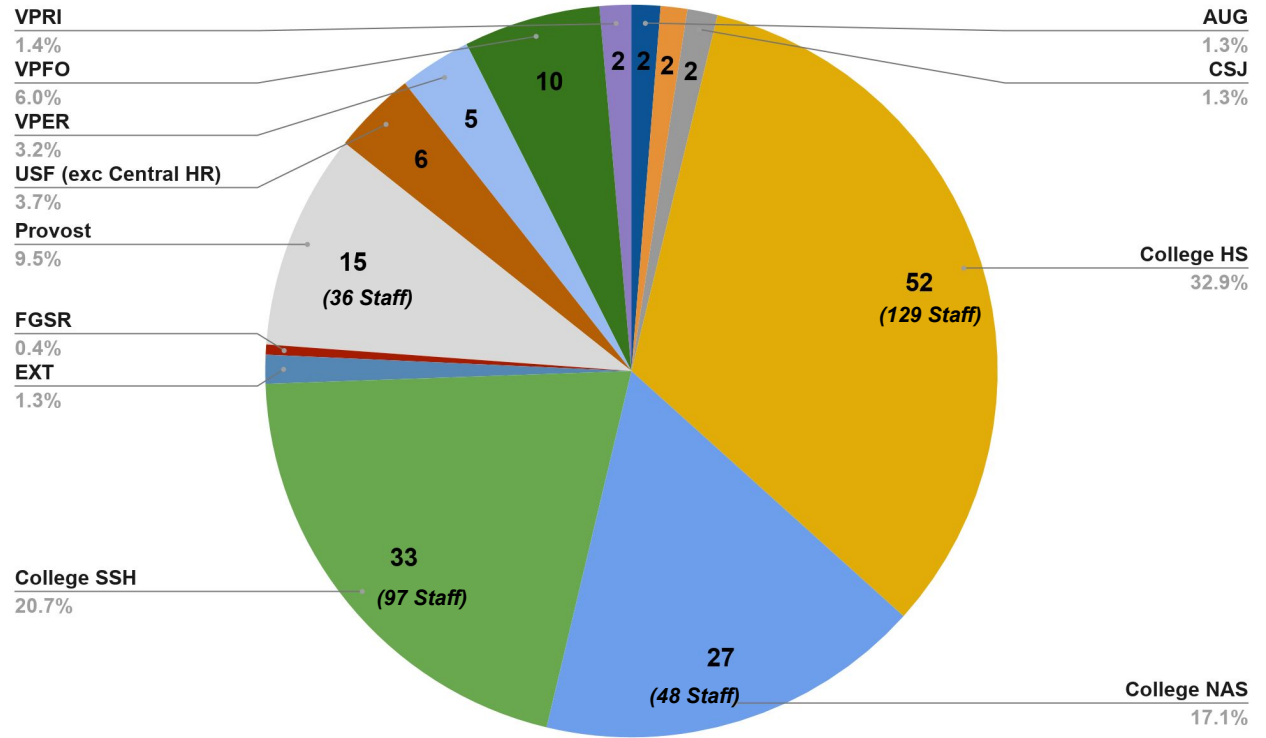
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Response Rate

Total of 70 Workbooks completed

- 18 Faculties - 55 Workbooks
- 4 Central Admin Units - 4 Workbooks
- 11 Central Academic/Research Units - 11 Workbooks

Distribution of Current 157 FTE / 355 Staff (excludes Central HR)
All Roles Categories

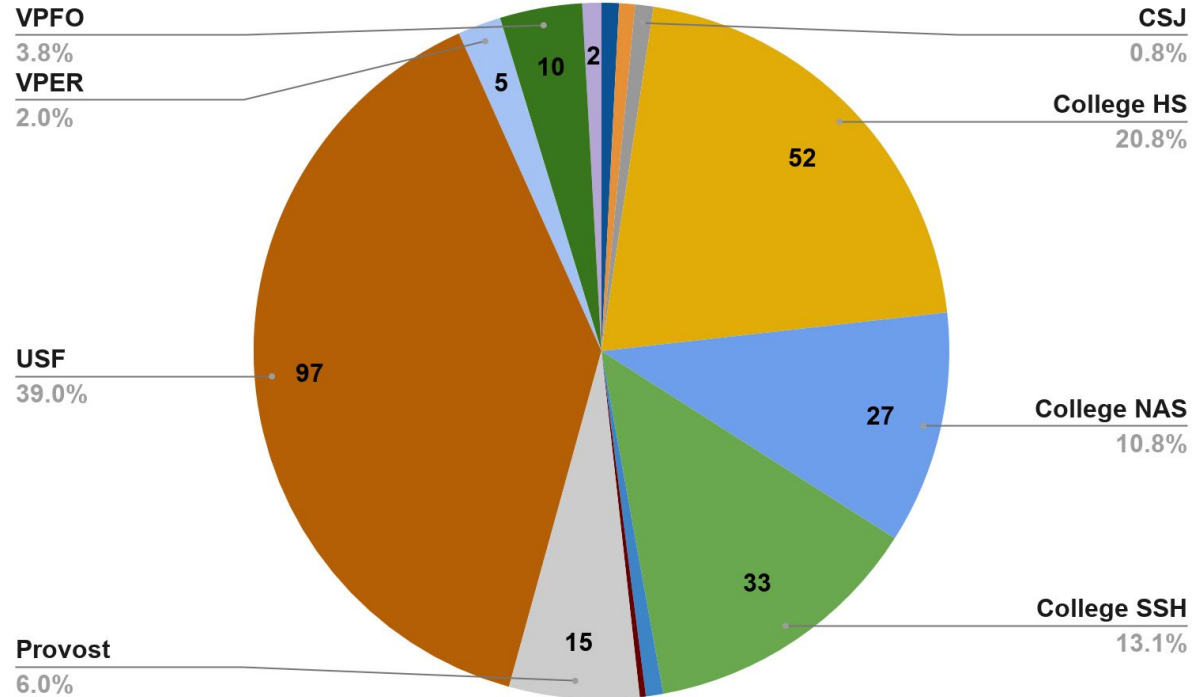**85% of resources are in Faculties & Academic Support Units**

VPRI
1.4%

VPFO
6.0%

VPER
3.2%

USF (exc Central HR)
3.7%

Provost
9.5%

FGSR
0.4%

EXT
1.3%

AUG
1.3%

CSJ
1.3%

College HS
32.9%

College NAS
17.1%

College SSH
20.7%

2 2 2 2

10

5

6

15
(36 Staff)

52
(129 Staff)

27
(48 Staff)

33
(97 Staff)

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Distribution of Current 248 FTE / 456 Staff (includes Central HR*)
All Roles Categories

Central HR FTE ~ 90

54% of resources are in Faculties & Academic Support Units

*Excludes EH&S

Pie chart labels:

- VPFO 3.8%
- VPER 2.0%
- USF 39.0% (97)
- Provost 6.0% (15)
- CSJ 0.8%
- College HS 20.8% (52)
- College NAS 10.8% (27)
- College SSH 13.1% (33)

Chart segment values: 5, 10, 2, 52, 27, 33, 15, 97

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Distribution of Resources (exc Central HR) by Role Category

Other Non HR
6.3%

Admin Support Roles
11.8%

Research Support
2.0%

Grad Advisor/Grad Admin
3.5%

Fin/HR/Research Roles
10.8%

Dedicated HR Advisor/Admin
30.9%

Sr Admin Roles (Non HR)
17.0%

HRP/HR Manager/Lead roles
17.8%

9.9
(45 Staff)

18.5
(55 Staff)

5.5
(23 Staff)

16.9
(42 Staff)

48.6
(52 Staff)
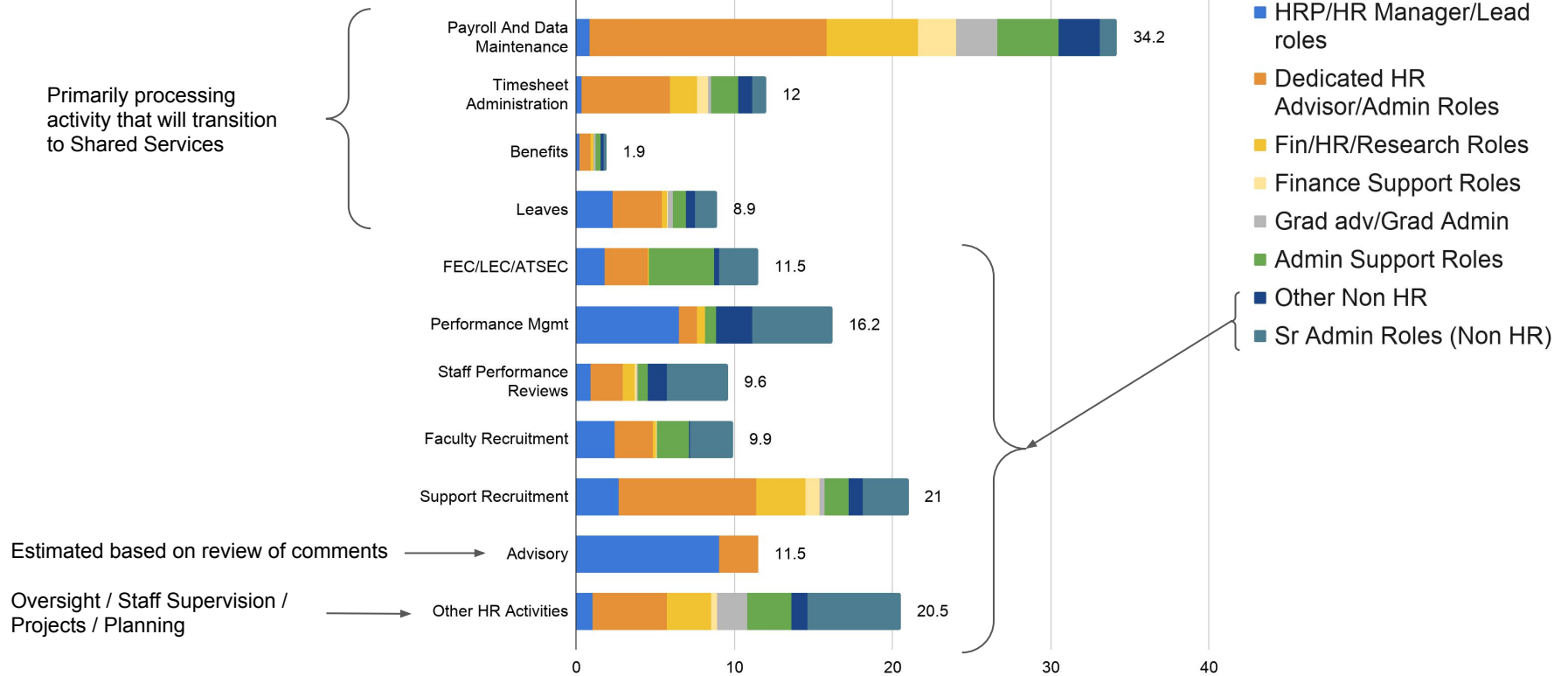
26.7
(83 Staff)

28
(36 Staff)
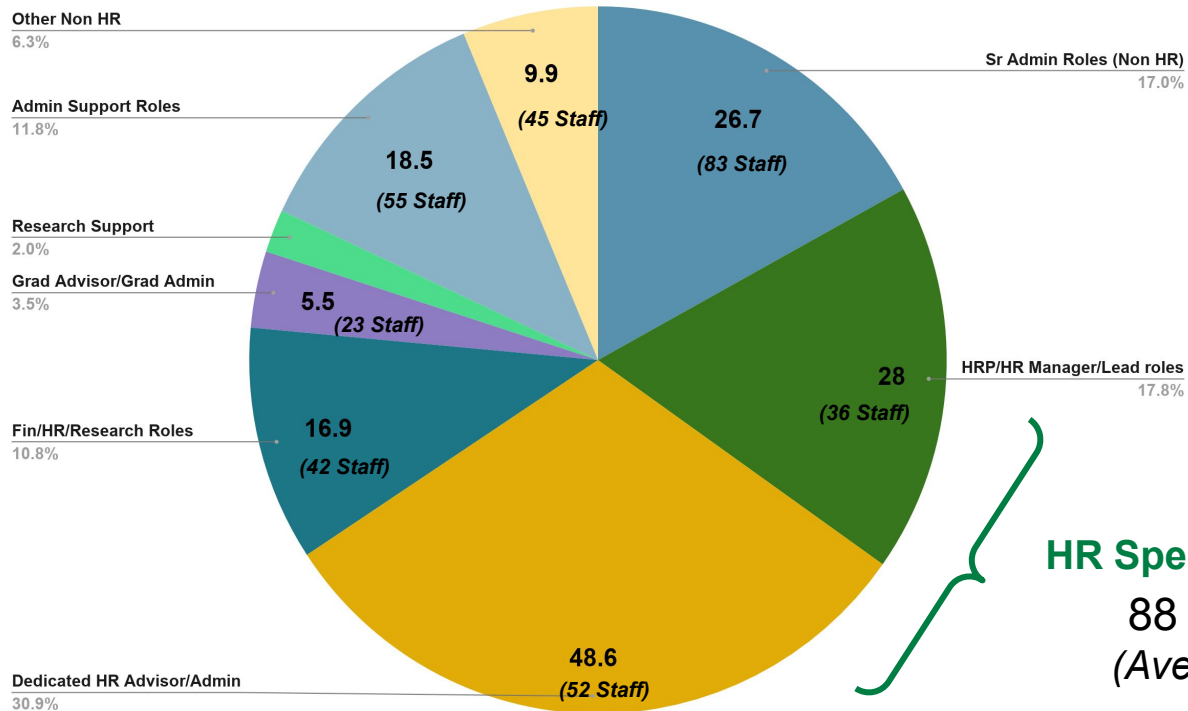
Sr Admin and Non HR
128 Staff > 36.6 FTE
These resources are involved in HR processes because they have direct reports but not directly included in the headcount we are impacting

HR Specific Roles (49%)
88 Staff > 76.6
(Average 0.9 FTE)

Distribution of the Activities By Role Category

Primarily processing activity that will transition to Shared Services

Activity	Value
Payroll And Data Maintenance	34.2
Timesheet Administration	12
Benefits	1.9
Leaves	8.9
FEC/LEC/ATSEC	11.5
Performance Mgmt	16.2
Staff Performance Reviews	9.6
Faculty Recruitment	9.9
Support Recruitment	21
Advisory	11.5
Other HR Activities	20.5

Estimated based on review of comments

Oversight / Staff Supervision / Projects / Planning

Legend:
- HRP/HR Manager/Lead roles
- Dedicated HR Advisor/Admin Roles
- Fin/HR/Research Roles
- Finance Support Roles
- Grad adv/Grad Admin
- Admin Support Roles
- Other Non HR
- Sr Admin Roles (Non HR)

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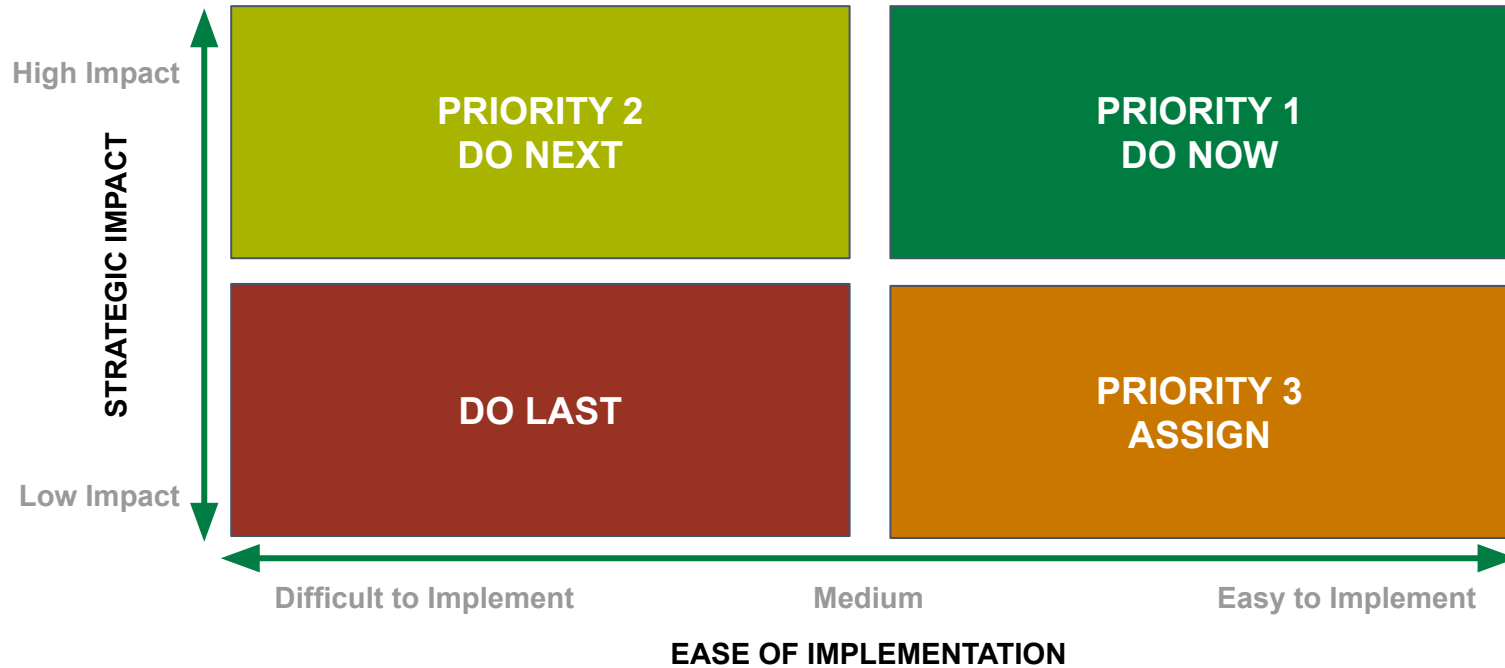# Target FTE vs Current HR Focused Staff

	FTE	Headcount
Based on Discovery Data (inc Central HR)	248	456
Remove Staff from other Functional Areas *(Sr Admin, Non HR, Admin Asst, Research Support, Grad Advisors)*	(64)	(236)
Remaining Roles with a Direct Focus on HR Activities	**184**	**220**
Breakdown of HR Focused Roles:		
Central HR Current FTE (approx)	90	90
HRP/HR Managers/Team Leads	28	36
HR Advisors/Coordinators/Admin	49	52
Combined Roles (Finance/HR/Research Admin)	17	42
	184	**220**

General Observations

Observation	Recommendation
Approx 75% of units have some sort of internal records mgmt system/approach (most common is google sheets/calendar) to keeping track of HR related documents	Leverage EDRMS. Access to electronic versions of documents processed by Shared Services will need to be critical component of redesigned processes
Employee files are a mix of google docs and hard copies filed locally	
The larger Faculties/Units have developed internal systems (most common is google sheets) to track employee events (eg illness leaves, vacations, probation, performance reviews, training)	This identifies a need that is not currently met by current systems. May be something that could provide a significant value and an early win. Initial review of participants show this is where admin support often tends to be involved in the process
Verbal or Email is the most common method for initiating processes	Opportunity to digitize process with online forms and technology supported workflows. This could improve process, increase visibility of process status and improve access to information.
Process variations are not as drastic as we thought. The variations are more associated with who is involved or who approves but the flow appears to be similar for many processes.	Standardization may be easier if we can deal with the perception that "everything is different"

Prioritization for Process Redesign

Criteria

Main Criteria	Criteria	Metrics
Strategic Impact	Potential cost savings	Current FTE/# actors (Discovery)
	Potential service improvement	anecdotal - how long it takes/ how often do you have to do it to get it right/visibility and tracking OR # external tool/sheets/systems to keep track of things (Discovery)
	Scale impact	Target audience, Volume of Transactions
Ease of Implementation	Process Complexity	Current and Future operating model component Process redesign impact on people - new roles, competencies required Process redesign impact on policies and procedures - revised policies and procedures
		# actors
		# variations across faculties/units
		# variations across emp types (for HR only)
		# sub-processes
	Technology	Effort required for associated technological changes and/or New systems/automation/enhancements

Methodology

1. Used Discovery data to determine ratings for each process (quantitative)
2. Reviewed results with selected HR specialists to evaluate ratings qualitatively
3. Reviewed full list with larger group of SET team members and Broader Group of HR specialists and determined relative importance to arrive at final prioritization
4. Reviewed priorities with HR Partners across the University
5. Sponsors approved the priorities

Prioritization Matrix

Scored processes were mapped to the prioritization template

PRIORITY 2

- Recruitment
- Onboarding
- Offboarding
- Salary & Benefits
- Manage Vacations/ Reconciliations
- Performance Review
- Process one-time payments
- Manage Awards & Scholarships
- GRA/GTA - Appt & Awards

PRIORITY 1

- Manage Timesheet
- Job Evaluation
- Employee appointment/ reappointment
- Update staff data

PRIORITY 4

- Manage Reimbursement/ Fund Programs
- WCB/H&S Incident Reporting
- Invite Academic Visitors
- Manage Summer/ Temporary Appoints
- APO/ Maps Annual Review Process
- Manage HR Reporting
- Manage/ Track Staff Training

PRIORITY 3

- Manage Person of Interest
- Non-Medical/ Special Leaves
- Manage Position Information
- Employment/ Residency Letters
- Combination Speedcodes
- Medical Leave

STRATEGIC IMPACT (H / M / L)

EASE OF IMPLEMENTATION (L / M / H)

Process Improvement Lead Group

After scoring, the Priority 1 and Priority 2 processes were allocated to the appropriate functional review team to determine ownership of the process improvement process. Allocation is largely based on expected future delivery centre for a given process.

- ● HR Functional Review
- ● Shared Service Functional Review
- ● Lead not yet assigned

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Priority 1 - Rationale

Priority	Process	Comments	Lead
Priority 1	Employee Appointment/Reappointment	• Scored high in impact (potential cost savings) and mid-level in complexity • Appointment/ reappointment will be an important component of transitioning staff • High-likelihood of success if start with this process	SSC
	Time & Labour	• Standardizing automated timesheets will be the new process • Scored highest in impact (potential cost savings) and lower in complexity - meaning the change effort will be more	SSC
	Job Evaluation	• Important because introducing job families important component of SET and will answer questions about existing JFS & grading process • Scored high in impact (same as T&L) and higher in complexity - meaning easier to implement • New job family work is completed and is ready to roll-out - will not require "process redesign" and can be rolled-out as an "quick win" for SET	CoE
	Staff information (non payroll) Updates	• Self-serve through staff service centre • Strategic impact was relatively low (not a lot of savings) but ease of implementation is high	SSC

Priority	Process	Comments	Lead
Priority 2	Staff Recruitment	• Scored high in strategic impact (potential cost savings) but hard to implement • Want to ensure success out of the gate, this is likely to be controversial	CoE
	Employee Offboarding	• High impact/ medium complexity • Need interim solution for upcoming changes and also require a long-term process	CoE
	Manage Vacation & Vacation Reconciliations	• High strategic impact (potential cost savings) due to the need to reconcile unused vacations and the costs the University carries • Medium ease of implementation	SSC
	Employee Orientation / Onboarding program	• High strategic impact but some complexity • PAF forms fairly easy but require a new orientation/ onboarding program	CoE
	Salary & Benefit Adjustments	• Low strategic impact (potential cost savings) but easy to implement • While elements of "payroll" exist in other processes, SBA must operate effectively during transition	SSC
	Annual Support Staff Performance Review process	• High strategic impact/ medium-high in complexity (some components easy to implement) • Non standardized process was raised during the RPI discussions. • There is an additional need to standardize the content of review forms (CoE)	SSC
	Manage Grad Student Appointments GTA/GRA	• Low strategic impact (potential cost savings), easy to implement • The priority comes from need to resolve ownership and the strategy of where it is in the operating model	SSC
	Manage Vacation & Vacation Reconciliations	• High strategic impact (potential cost savings) due to the need to reconcile unused vacations and the costs the University carries • Medium ease of implementation	SSC
	Manage Awards & scholarships (not already managed by FGSR)	• Low strategic impact, easy to implement • Priority driven by volume and opportunity for improvement with process review	SSC
	One-time Payroll Payments	• Medium-high impact and medium complexity • Potential high volume during transition	SSC

Next Steps

- Moving forward with first two priorities - appointment/ reappointment & job evaluation
- Call-out for working group members and feedback group members went out the week of Feb 1st, 2021
- Will be using working groups/ feedback groups to redesign each of the processes in the context of the new operating model, identifying:
  - Where work will be done in the new model
  - Opportunities for improvement
  - Implementation considerations