INTEGRATED RENEWAL PROGRAM

HR Update – Call In Session #2
Alex Bayne, IRP Sponsor & Managing Director, Strategic Initiatives, Learning & Engagement
Gerald Vanderwoude, Senior Human Resources Manager, HR Work Stream, Integrated Renewal Program
November 7, 2018

To view a recording of this session, please see: https://vimeo.com/299542782
We will begin shortly - please note:

- We have muted your audio to ensure higher quality sound during the session. You can hear the presenters, but the presenters won’t hear you.

- If you have a technical issue during the session, please use the CHAT feature located on the right hand side of the screen.

- The materials used in today’s session are in the Outlook meeting invite.

- To ask questions during the session, please go to https://www.sli.do/ and enter the event code #IRPHR

- We will answer questions throughout the session as time allows.
WELCOME

ALEX BAYNE

IRP SPONSOR & MANAGING DIRECTOR, STRATEGIC INITIATIVES, LEARNING AND ENGAGEMENT
SESSION #1 RECAP

- September 27, 2018

- Presentation materials available on IRP website in the Resources section at [https://integrated-renewal.ubc.ca/](https://integrated-renewal.ubc.ca/) (includes instructions session recording)

- Feedback survey - preference for monthly meetings
TODAY’S DISCUSSION

- Integrated Renewal Program (IRP) Update

- Learn more about the work of the IRP HR Team – the last 30 days, the next 30 days and beyond…

- Ask Questions of the team
### WHAT IS THE SCHEDULE BY STREAM/SCOPE*?

<table>
<thead>
<tr>
<th>Release #</th>
<th>Date</th>
<th>Stream</th>
<th>Scope/Functionality</th>
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</thead>
<tbody>
<tr>
<td>1</td>
<td>April 2020</td>
<td>Capital &amp; Asset Accounting, Institutional Accounting, Procure to Pay, Research/Post-Award Grant Admin, Revenue Accounting, Travel &amp; Expense Management, Treasury &amp; Cash Management</td>
<td>Benefits, Compensation, Core HCM, Onboarding/Offboarding, Payroll, Talent Acquisition, Workforce Management – Time and Attendance</td>
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<td></td>
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<td>Curriculum Management (Academic units, Programs of Study and foundational elements)</td>
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<td></td>
<td></td>
<td></td>
<td>Deployment of common enabling technologies: Access and Identity Management, Generic Capabilities, Reporting</td>
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<tr>
<td>2</td>
<td>July 2020</td>
<td>Curriculum Management (Courses), Admissions, Transfer Credit, Learner Management (Data), Learner Financial Management (Application Fees)</td>
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<tr>
<td>3</td>
<td>Feb 2021</td>
<td>Scheduling, Enrolment, Registration, Program Planning &amp; Management, Progression, Learner Management</td>
<td></td>
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<tr>
<td>4</td>
<td>May 2021</td>
<td>Assessment Outcomes, Learner Financial Support, Learner Financial Management, Graduation</td>
<td></td>
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<tr>
<td>5</td>
<td>June 2021</td>
<td>Budget Development &amp; Forecasting</td>
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* Workday release schedule is subject to change. HR, FIN are foundational to enable Student releases.
WHERE ARE WE AT IN THE PROGRAM?

**R1 PLAN (HRFIN)**

1. Deliverable: Develop Foundation Data Model and preliminary UBC Workday tenant build.

**R1 ARCHITECT (HRFIN)**

2. We are here!

**R1-4 PLAN (STUDENT)**

- **HRFIN R1 Objective:** Determine how UBC wants Workday to function across HRFIN streams.
- **STU R1-4 Objective:** Develop future vision for Student and explore Workday functionality

**CONFIGURE & PROTOTYPE**

- **CONFIGURE & PROTOTYPE**
  - This is where we extend wider engagement of the campus community.
  - The campus community will help shape how Workday functions at UBC, using an iterative process prior to go live.

*Student Plan stage for Releases 1-4 begins in November 2018*
WORKSTREAM UPDATE – HUMAN RESOURCES
WORK IN PROGRESS & PLANNED
ARCHITECT STAGE OVERVIEW

In this stage we are focusing on:

- Gathering **requirements** for Workday

- **Documenting** current business processes

- Holding **Design Workshops** with UBC Subject Matter Experts (SMEs)

- Building the **first prototype** of Workday – called a **Tenant**
WHAT IS A TENANT?

Each Workday client has their own secure tenant only they can access.

Think of Workday as a large apartment building and each customer has their own floor – ours is the UBC tenant.

In our tenant we can ‘configure’ our floor – move the walls, decide where the windows will be, etc.

Building the tenant is an iterative process – at each stage of the program, Workday uses UBC faculty/unit information and sample data to populate our tenant and review functionality and potential configurations.
HR WORK STREAM – WORK TO DATE

Architect – Design Workshops
- 60+ workshops with Workday consultants and HR Subject Matter Experts (SMEs) representing each Functional area of the HCM work stream

Building the Supervisory Organization (Sup Org)
- Foundational work - UBC faculty/unit information built into our first tenant

Completing the HR Workday Workbooks
- Taking all of our Collective Agreements policies and procedures and loading this into our tenant

Governance & Decision Making Framework
- Membership confirmed and first meeting of Integrated Process & Outcomes Committee (IPOC) – HR Sub Committee
BUILDING THE SUPERVISORY ORGANIZATION

Supervisory Organizations are the **foundation** of Workday HR/HCM

A Supervisory Organization is a logical grouping of employees who report to the same manager

Each manager is associated with a Supervisory Organization that contains the workers and the positions they manage.
BUILDING THE SUPERVISORY ORGANIZATION – WITH YOUR HELP

- Throughout September we engaged 20 faculties and VP portfolios
- Each group provided and reviewed all of their HRMS ‘Reports To’ data
- We received data for 500 departments
- We created 3,700 Sup Orgs in our Tenant – representing 25,000 active UBC employees!!!
- 80% of the community represented in the Sup Orgs, with 20% educated guess
- Validation with community upcoming in early 2019

Thank you!!!!
GOVERNANCE & DECISION MAKING

HR Subcommittee Integrated Process & Outcomes Committee (HR IPOC)

- Meets monthly to make decisions on HR-specific process areas

- Primary body responsible for overseeing, approving and recommending the alignment of business processes and program outcomes and benefits

- Members are leaders responsible for the functional operations of HR at UBC and will make decisions related to processes and outcomes for HR/HCM in IRP
Chairs from each sub-committee (Student, HR, Finance) are members of the Integrated Process & Outcomes Committee. Multiple working groups will be formed within each of the streams and working group leads will work with their respective sub-committees for consultation and appropriate decision making.

Legend - Integrated Process & Outcomes Committee
- Members with decision making authority
- Ex-officio members
- Chair person of the Integrated Process and Data Committee. Also has decision making authority.
- Sub-committees and working groups
INTEGRATED PROCESS & OUTCOMES COMMITTEE (IPOC)

HR Sub-Committee

- **Chair:** Michelle Berner, Managing Director, HR – Total Compensation, Health & Wellbeing
- Alex Bayne, Managing Director, HR – Strategic Workplace Initiatives, Learning & Engagement
- Linda McKnight, Managing Director, HR – Strategic Staff Relations
- Allison Matacheskie, Managing Director, HR – Strategic Faculty Relations
- Janie McCallum, Assistant Dean, Human Resources, Faculty of Science
- Gill Henderson, Director, HR – UBC Okanagan
- Shanda Jordan Gaetz, Executive Director, Faculty Affairs, Faculty of Medicine
- Trish Pekeles, Executive Director, Financial Operations
- Carri Lawrence, Director, Finance Operations, UBC Okanagan

**Academic Members:**
- Sylvie Desjardins - Associate Dean and a/ Head, Barber School (UBC-O)
- Other: TBD

**Ex Officio:**
- Nasrin Khan, HR (HCM) Transformation Director
- Deirdre Brown, HR (HCM) Change Management Lead
- HR (HCM) IRP Leads as guests, as needed

**Guests as needed:**
- Barbara Meens Thistle – Vice President, Human Resources
- Others, depending on the discussion items

**IPOC - HR Next Meeting – November 15, 2018**
THE NEXT 30 DAYS

- The Tenant build continues
- Final Architect Design workshops
- Architect stage wrap up, Configure & Prototype starts January 2019
- IRP comprehensive Project Plan
NEXT CALL IN SESSION (EARLY DECEMBER)

- Details of the comprehensive IRP Program Plan

- Review upcoming community engagements – including when you can ‘see’ the Tenant in the new year

- Share details about how we will be engaging HR practitioners across campus to support the configuration of business processes

Staying in Touch

Email us at integrated.renewal@ubc.ca
QUESTIONS & ANSWERS

On the phone? Go to https://www.sli.do/ and use event code #IRPHR

On the computer? Use the Chat feature on the right hand side of the screen or go to www.sli/do and use event code #IRPHR
WANT TO LEARN MORE?

Visit [www.integrated-renewal.ubc.ca](http://www.integrated-renewal.ubc.ca) to learn more about the program, latest news and Workday videos.


Visit [www.Workday.com](http://www.Workday.com) to learn more about its commitment to higher education. Visit Workday’s [YouTube](http://www.youtube.com) channel.
The Integrated Renewal Program would love to hear from you! If you have any questions or comments please get in touch.

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