INTEGRATED RENEWAL PROGRAM

HR Update – Call In Session #4
Alex Bayne, IRP Sponsor & Managing Director, Strategic Initiatives, Learning & Engagement
Gerald Vanderwoude, Senior Human Resources Manager, HR Work Stream, Integrated Renewal Program
Lani McGill, Core HR Lead, Integrated Renewal Program

To view a recording of this session, please see: https://vimeo.com/314840147

January 29, 2019
WELCOME

ALEX BAYNE

IRP SPONSOR & MANAGING DIRECTOR, STRATEGIC INITIATIVES, LEARNING AND ENGAGEMENT
SESSION #3 RECAP

- December 6, 2018

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

- Supervisory Organizations – engaging the Transition Network, validating the data, and what’s next

- Ask Questions of the team
### FUNCTIONAL SCOPE & SCHEDULE

#### STUDENT
- Admissions (Undergraduate)
- Assessment Outcomes
- Curriculum Management (limited)
- Enrolment
- Graduation
- Learner Financial Management
- Learner Financial Support
- Learner Management
- Program Planning and Management
- Progression
- Registration
- Scheduling
- Transfer Credit

#### HUMAN RESOURCES
- Benefits
- Compensation
- Core HCM
- Onboarding/Off-boarding
- Payroll
- Talent Acquisition
- Workforce Management – Time & Attendance

#### FINANCE
- Budget Development (core to Workday)
- Capital and Asset Accounting
- Endowment Accounting (UBC Methodology)
- Forecasting (Workday Planning)
- Institutional Accounting
- Procure to Pay
- Research/Post Award Grants
- Revenue Accounting
- Treasury and Cash Management
- Travel and Expense

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**April 2020**
WHERE ARE WE AT IN THE PROGRAM?

HR/FIN Release 1 PLAN
May – July 2018
Deliverable: Develop Foundation Data Model & preliminary UBC Workday tenant build.

HR/FIN Release 1 ARCHITECT
August – December 2018
Deliverable: Determine how UBC wants Workday to function across HR/FIN streams.

STUDENT Release 1-4 PLAN
November 2018 – February 2019
Deliverable: Build STUDENT tenant and implementation plan.

HR/FIN Release 1
CONFIGURE & PROTOTYPE
January – June 2019
Deliverable: Develop an HR/FIN Workday tenant, based on Architect phase decisions, that is ready for the testing phase.
WORKSTREAM UPDATE – HUMAN RESOURCES
WORK IN PROGRESS & PLANNED
HR WORK STREAM – LAST 30 DAYS

Workday Testing Scenarios
- Built 100’s of testing scenarios for UBC’s tenant that will be used by the HCM team to validate the configuration we have built to date

Completed Plan for Configure & Prototype Stage
- Identified activities required

Report Inventory
- Identified and reviewed current HR reports to determine what Workday delivered report(s) are available

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

Workday Tenant Walkthrough & Validation
- Reviewed the new iteration of our tenant, validated HR business processes built to date and tested Workday’s functionality with UBC rules
 Architect Stage Wrap Up/Configure & Prototype Kick Off

- Shared key HR and FIN work stream decisions and work completed to date in the Architect stage with workshop participants.

 Supervisory Organization Data Validation

- Prepared Sup Orgs created in Workday and Reports To information in HRMS for community validation.
- Met with 160+ stakeholders at Learn@Lunchtime Supervisory Organization sessions to share information about ‘Sup. Orgs’ and Workday terminology and concepts.
- Completed a Transition Network Leads data validation training session.
HR WORK STREAM – NEXT 30+ DAYS

February - March 2019

- **Unit Testing** – HCM team begins running the scenarios we created to test the business process design and data we have put into the tenant to date.

- **Reporting** – creation and testing of priority reports in the tenant.

- **Customer Confirmation Sessions** – with HR stakeholders previously involved in HCM design sessions, Architect workshops and/or have foundational knowledge of Workday and HR processes. Sessions to review and validate HR-related business process built in our tenant to date.

- **Call In Sessions** – February date TBD, March 5

- **Supervisory Organization Data Validation** due March 31
SUPERVISORY ORGANIZATIONS

ENGAGING THE TRANSITION NETWORK
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 in early 2019
  - Learn@Lunchtime sessions
  - Engaging the IRP Transition Network Leads & Captains
Subject Matter Experts from faculties/units are critical contributors to design our systems and processes for the future – some will serve a dual role as Transition Captains.

The Transition Network comprised of faculty/unit senior liaisons (Leads) and hundreds of individuals within departments and units (Captains) to support localization of the change.

Campus Support Partners will be engaged and leveraged to support and extend OCM activities from trusted voices.
KEY RESPONSIBILITIES OF TRANSITION NETWORK LEADS

Leads

- Facilitating effective two-way communications between their home Faculty/units and the IRP
- Being the senior “go-to” person within a Faculty/unit for information about the IRP
- Ensuring the re-alignment of unit practices, processes, materials, data, reporting and local applications to adapt to the Workday future state
- Overseeing the learning and adoption of new processes and Workday functions throughout the home Faculty/unit; assisting IRP in assessing readiness of home unit to adopt the future state
- Participating in Transition Network Change Management training opportunities.
- Participating in Transition Network discussions and events
- Recruiting, onboarding and working with unit-based Transition Captains to help navigate change

Each unit will determine the best approach for defining and resourcing this role according to their needs and ambitions
KEY RESPONSIBILITIES OF TRANSITION CAPTAINS

Captains

- Being the “go-to” person within their home unit for information about the IRP
- Communicating updates and key messages about the IRP to home unit personnel
- Assessing and re-aligning unit practices, processes, materials, data, reporting and local applications to adapt to Workday future state
- Being trained on new processes and Workday functions to support system users in their units
- Identifying training needs and facilitating learning opportunities throughout unit
- Overseeing the adoption of new processes and Workday functions throughout unit
- Escalating questions, concerns and issues to their Transition Lead for resolution
- Participating in Transition Network discussions, events and trainings

Depending on size and complexity, units may have from one to dozens of Captains. Some may focus on one of HR, Finance, Student, or IT or cover more than one area.
SUPERVISORY ORGANIZATIONS

VALIDATING DATA BY MARCH 31
WE’VE BUILT THE FRAMEWORK AND NOW….

• We need the community’s help to validate key Sup Org data the HCM team has built in our tenant to date

• We will use this validated data to build the next iteration of our tenant (May 2019)

• Transition Network Leads & Captains will assist -- and they may ask for your help

• By March 31 – we are asking for the community’s help to:
  • Validate key data for your department/unit is accurate (names of Managers)
  • Name each Supervisory Organization (using naming conventions provided)

• Leads will be reaching out as appropriate for their department(s) after February 4

• You may be called on to review data in Excel spreadsheets, review names of Managers, confirm Sup Org name etc.
# SUP ORG DATA VALIDATION – OVERVIEW

## Read Only – No Change Required

<table>
<thead>
<tr>
<th>Faculty</th>
<th>Department</th>
<th>Employee Name and Position</th>
<th>Manager Employee ID</th>
<th>Manager Name</th>
<th>Manager Position Title</th>
<th>Manager Position Number</th>
<th>Employee Supervisor Organization</th>
</tr>
</thead>
<tbody>
<tr>
<td>Faculty of Animation</td>
<td>Faculty of Animation</td>
<td>Mickey Mouse, Dean</td>
<td>765432</td>
<td>Law McGill</td>
<td>IRP</td>
<td>3456789</td>
<td>Leadership (Faculty of Animation)</td>
</tr>
<tr>
<td>Faculty of Animation</td>
<td>Faculty</td>
<td>Captain Hook, Lecturer</td>
<td>4567890</td>
<td>Mickey Mouse</td>
<td>Dean</td>
<td>2345678</td>
<td>Faculty of Animation (Mickey Mouse)</td>
</tr>
<tr>
<td>Faculty of Animation</td>
<td>Staff</td>
<td>Claudia DaVe, Accounting</td>
<td>4567890</td>
<td>Mickey Mouse</td>
<td>Dean</td>
<td>2345678</td>
<td>Staff (Faculty of Animation (Mickey Mouse))</td>
</tr>
<tr>
<td>Faculty of Animation</td>
<td>Department of Fish Types</td>
<td>Princes Cinderella GTA</td>
<td>4567890</td>
<td>Donald Duck</td>
<td>Associate Professor</td>
<td>5432109</td>
<td>Student Research (Rainbow Trout Lab)</td>
</tr>
<tr>
<td>Faculty of Animation</td>
<td>Department of Chams</td>
<td>Bull Queen, Walt Disney</td>
<td>2745343</td>
<td>Prince Charming</td>
<td>Administrator</td>
<td>3456789</td>
<td>Accounting Support (Department of Chams)</td>
</tr>
</tbody>
</table>

## Review & Update Information

If you would like to update any information, please provide the following:

- Department
- Manager Employee ID
- Manager Name
- Manager Position Title
- Manager Position Number
- Notes
SAMPLE SUPERVISORY ORGANIZATION - ACADEMIC

Faculty (Mickey Mouse)

Mickey Mouse
Dean
UBC Vancouver Point Grey

Research | Fish Types

Donald Duck
Assistant Professor (tenure)
UBC Vancouver Point Grey

Captain Hook
Lecturer
UBC Vancouver Point Grey

Tinker Bell
General Librarian (grant…)
UBC Vancouver Point Grey

Princess Cinderella
CUPE 2278 Hourly | Gradu…
UBC Vancouver Point Grey

Princess Jasmine
CUPE 2278 Hourly | Gradu…
UBC Vancouver Point Grey

Snow White
Student Salaried – Grad…
UBC Vancouver Point Grey
SAMPLE SUPERVISORY ORGANIZATION – SERVICE UNIT

Staff (Mickey Mouse)

Mickey Mouse
Dean
UBC Vancouver Point Grey

Accounting Support | Department

Prince Charming
Administrative Manager
UBC Vancouver Point Grey

Cheshire Cat
HR Administrative Assistant
UBC Vancouver Point Grey

Cruella De Vil
AAPS Salaried Accounting
UBC Vancouver Point Grey

Jiminy Cricket
AAPS Salaried Administrative
UBC Vancouver Point Grey

Mary Poppins
CUPE 2950 Hourly | Grad...
UBC Vancouver Point Grey

Minnie Mouse
AAPS Salaried – Accounting
UBC Vancouver Point Grey

Evil Queen
Student Hourly – Work Lea...
UBC Vancouver Point Grey

Wendy Darling
CUPE 2950 Salaried-Grad...
UBC Vancouver Point Grey

White Rabbit
BCGEU OK Salaried - Secret
UBC Vancouver Point Grey
<table>
<thead>
<tr>
<th>Faculty/VP Portfolio - Name</th>
<th>SUP ORG/HR FOCUS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applied Science – Max Chang</td>
<td>Facilities/Infrastructure – Janice Weigel, Carmen Raiche de Araujo (Captain)</td>
</tr>
<tr>
<td>Arts – Kathryn Stagg</td>
<td>Financial Operations – Ingeborg Brown</td>
</tr>
<tr>
<td>Athletics &amp; Recreation - Gord Hopper &amp; Michael Tan</td>
<td>Graduate + Postdoctoral Studies – Brendan Morey</td>
</tr>
<tr>
<td>Building Operations – Danielle Liu, Gregor MacDonald, Robin Shortt, Jessica Zanette (Captains)</td>
<td>Human Resources (Central) – Alex Bayne</td>
</tr>
<tr>
<td>Dentistry – Susanne Schmiesing</td>
<td>Land &amp; Food Systems – Barbara Hsiao</td>
</tr>
<tr>
<td>Development and Alumni Engagement Services – Hannah Hashimoto, Svetlana Perry &amp; Klodiana Kondo (Captains)</td>
<td>Law - Sakir Hirani &amp; Lia Cosco</td>
</tr>
<tr>
<td>Education – Anna Bin</td>
<td>Library – Ina Reiche</td>
</tr>
<tr>
<td>Energy &amp; Water Services – David Woodson</td>
<td>Payroll – Harjot Guram &amp; Iuliana Gafincu</td>
</tr>
<tr>
<td>Enrolment Services – Ashley Elchuk</td>
<td>Pharmaceutical Sciences – Janet Ferraro</td>
</tr>
</tbody>
</table>
# TRANSITION NETWORK LEADS – SUP ORG/HR FOCUS

<table>
<thead>
<tr>
<th>Faculty/VP Portfolio - Name</th>
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</tr>
</thead>
<tbody>
<tr>
<td>President’s Office – Julie Wagemakers &amp; Liz Coughlin</td>
<td>Student Housing &amp; Hospitality Services – Krista Power &amp; Laura Nolan (Captains)</td>
</tr>
<tr>
<td>Procurement/Supply Management – Lisa Rockford</td>
<td>Student Development &amp; Services – Gina Blaeser &amp; Andrea Sherrington, Margaret Tough (Captains)</td>
</tr>
<tr>
<td>Provost Office – Laura Lockyer-Cotter</td>
<td>UBC IT – Yolanda Gonzales, Marcela Hernandez, Anje Skomorowski, Kay Chu (Captain)</td>
</tr>
<tr>
<td>Medicine – Michael Shakespeare &amp; Gabriel Rose</td>
<td></td>
</tr>
<tr>
<td>Research and Innovation – Greg Martyn</td>
<td></td>
</tr>
<tr>
<td>Sauder – Sandy Tanaka &amp; Ani Hosepyan</td>
<td></td>
</tr>
</tbody>
</table>

If you don’t see a Lead for your area, please reach out to Lani or Gerald for more information.
TRANSITION NETWORK LEADS – SUP ORG/HR FOCUS – UBC OKANAGAN

For a complete list, please contact:
• Ashley Bloor, Subject Matter Expert – UBCO & Recruitment, HR Workstream, IRP
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
NEXT STEPS

Next Call In Session – February/March 5

Agenda items to include:
- Update on Supervisory Organization work
- Review upcoming community engagements – including when you can ‘see’ Workday/a Workday demo

Staying in Touch
Email us at integrated.renewal@ubc.ca
WANT TO LEARN MORE?

Visit www.integrated-renewal.ubc.ca to learn more about the program, latest news and Workday videos.

Watch a 2-minute video of Professor Ono sharing his vision for the Integrated Renewal Program, “The Workday Implementation Journey Starts Now” (News section).

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

WEBSITE  integrated-renewal.ubc.ca

EMAIL  integrated.renewal@ubc.ca