

The background is a solid teal color. In the top-left corner, there is a cluster of seven interlocking gears of various sizes and shades of blue and black. In the bottom-right corner, there is another cluster of seven interlocking gears, also in various shades of blue and black, mirroring the top-left cluster.

Human Capital Management

Ivy+ Enterprise Systems Symposium Series

September 1, 2022

How this meeting will work



VIDEO ON
(if possible)



MIC MUTE



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**POLL
EVERYWHERE**
for Q&A

pollev.com/suzoom

- Have another device or open another browser window to log into PollEv
- Reach out to our tech team via Zoom Chat if you run into a problem

Agenda

8:45 a.m. PT ***Cindy Martin*, session moderator**
Stanford University

9:00 a.m. PT ***Karl Haslwanter***
University of Chicago

10:00 a.m. PT **University of Chicago Q&A**

10:20 a.m. PT **Break**

10:30 a.m. PT ***Chris Blickley***
University of Pennsylvania

11:30 a.m. PT **University of Pennsylvania Q&A**

11:50 a.m. PT **Next Steps and Next Session Topics**



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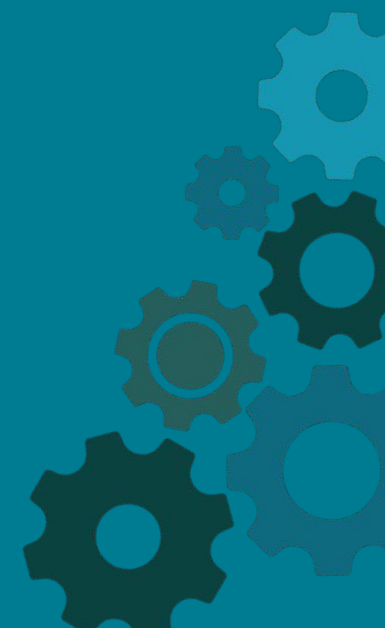
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University of Chicago's Workday HCM Journey

Thursday, September 1, 2022



Karl Haslwanter

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A photograph of a University of Chicago campus scene. In the background, a large, ornate Gothic-style building with a red-tiled roof and multiple gables is visible. In the foreground, a paved path leads towards the building, flanked by trees with vibrant autumn foliage in shades of orange, yellow, and green. A black wrought-iron archway with a lamp post stands on the left. On the right, a person is sitting on a concrete ledge, looking towards the path. A bicycle is parked near the archway.

Agenda

- About the University of Chicago
 - Workday at UChicago
- Workday Implementations
- Lessons Learned
- Questions



About the University of Chicago

About the University of Chicago

- Private, non-denominational research university, based in Hyde Park
- 12,000+ faculty/staff; ~5,000 student employees
- ~6,300 students, ~10,000 graduate students
- 4 global centers; programs in ~40 countries and on every continent
- 5 divisions; 8 schools; 140+ institutes and centers
- The largest employer and engine for economic development on the South Side of Chicago



Cobb Gate

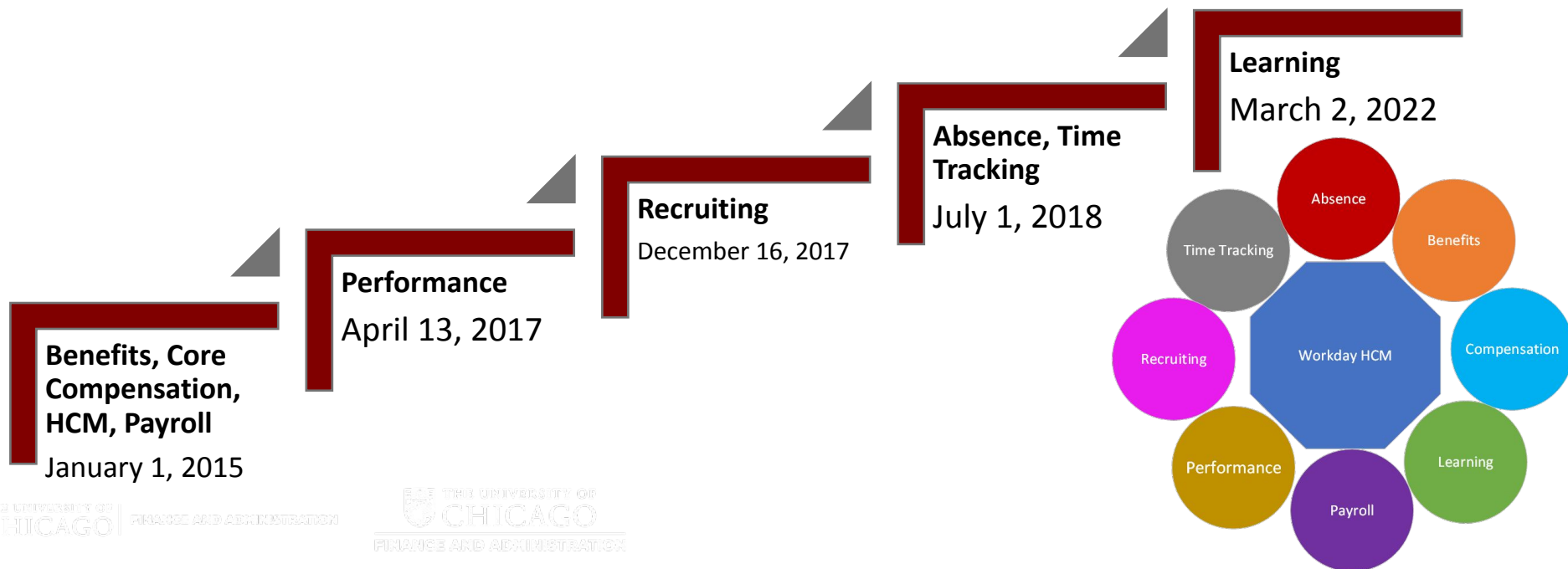


Current HR Setup

- 40 academic divisions and administrative departments
- Central SMEs in Payroll, Benefits, HR, Talent & Rewards
- 234 HR Business Partners handling staff, academics, student workers, postdocs, and temps
- 5 Workday admins responsible for updates, implementations, and system maintenance
- Limited manager self-service (Time Tracking, Absence Management, Performance*, Recruiting)
- ESS: Payroll, HCM, Performance*, Time Tracking, Absence Management, Benefits

Workday at the University of Chicago

- Workday is the system of record for Absence Management, Benefits, Compensation, HCM, Learning, Payroll, Performance, Recruiting, and Time Tracking
- Additional Modules launched across 5 implementations





Workday Implementations

University of Chicago HR before January 1, 2015

- Highly customized Oracle-based mainframe (Technology was outdated, inefficient, and would no longer be supported past 2017)
 - Significant Risks
 - Limited disaster recovery plan
 - Employees and Contractors were tracked using their SSN, hiring and termination process was inefficient
 - HR/Payroll processes were overinvested in people and underinvested in technology, are not scalable and prone to errors
 - Use of Paper forms
 - Use of manual reports and “human interpretation”
 - 7-10 data entry workers in Central HR as well as couriers

University of Chicago HR before January 1, 2015

- Prevented HR from delivering core HR Services
 - No automatic routing of work
 - No core position management capabilities (unable to report on vacancies)
- Decentralization (even more so)
 - Highly limited departmental access to mainframe
 - Academic Department productivity is negatively impacted
 - Dozens of unconnected local systems
 - Minimal duplicate management

University of Chicago HR before January 1, 2015

PERSONNEL [REDACTED] ***JOB ASSIGNMENT DATA*** PERIOD04
 UNIVERSITY OF CHICAGO
 ACTIVE

JOB NO 2 JOB CLASS 924100 RESP DEPT MEDICINE JOB TITLE TERM ALLOWANCE #1
 TOTAL JOBS 6 JOB DEPT MEDICINE
 BEGIN DATE 07/01/2010 END DATE 06/30/2013 REG/TEMP R
 POSITION NO TERM REASON CLASS ENTRY DATE 07/01/2010
 PAY RATE 6374.667 TERM APPT RANGE/STEP MZ
 SAL CHG RESN CH JOB DEPT 20122 PAY CYCLE M1
 SAL CHG DATE 07/01/2012 BEN LVL JOB 2 PERF RATE
 HRS/WEEK EFFORT RATIO 0000 EMP REPLACED ID 00000000
 SUPERVISOR INDEF REASON REVIEW DATE
 ACAD DISC? N H/A/F/C/P? A SHFT EARN CALC 000
 TIME APR 1 SAL EXCEPT FLEX SAL SCALE NA
 TIME APR 2 ON QTR START ON QTR STOP
 NO ACCOUNT ERN RATE/AMT PERCENT START STOP
 1 4555551100 CTA 6374.667 100.00 07/01/2010 06/30/2013
 2 .000
 3 .000

COMPLETE NEXT TRANSACTION REQUEST.
 TRANS [REDACTED] EMPL [REDACTED] JOB 2 ORG QTR
 PF16=TRAN MENU PF1=HELP TEXT PF2=PAGE BACK PF3=PAGE FWD PF7=INQUIRY
 PF8=TABLE INQ PF9=DET EDITS PF11=FUNC MENU PF12=SIGN OFF

TCPIP0014 4:22 PM 3/27/2013

Workday HCM Go-Live: January 1, 2015

- Four core modules
 - Benefits/Open Enrollment (US)
 - Core Compensation
 - HCM
 - US Payroll



**Personal
Information**



Pay



Benefits

Workday HCM Go-Live: January 1, 2015

- Assessment and Project was a 2+ year process with the project kicking off in September 2013
 - Broadly speaking, HR was tasked with three strategic objectives:
 1. Mitigate HR risks to the University
 2. Deliver core HR services effectively and efficiently
 3. Develop the University's talent base
 - Partnered with Deloitte (implementation) and Collaborative Solutions (training, change management)
 - Cross-functional team: Payroll, Benefits, HR, Compensation, IT Services, Communications
 - Some process redesign; mostly replicated existing workflows
 - Minimal backwards conversion for terminated workers
 - First higher ed Workday client to go live on time!

Workday Performance: April 13, 2017

- Mini-implementation: gave Workday some time to settle first
- Go-live on April 13th; first year-end process launched May 8th, 2017
- Two review processes (mid-year and year-end) run every year since 2017
- UChicago does not use skills
- Employee ratings are displayed in the annual increases process; no automatic relationship
- Started with nine organizations
 - Civic Engagement
 - Safety & Security
 - Facilities
 - IT Services
 - Human Resources
 - Finance
 - Legal Counsel
 - Research Administration
 - Office of the CFO
- Current process: 17 departments, adding more every time
- 3,700+ reviews completed during our last review period



My Performance

Workday Recruiting (Staff): December 16, 2017

- Used a custom-built system
 - Not particularly user-friendly
 - Bad first impression for applicants
 - Limited reporting capability
- Implementation started June 2017
 - Deloitte (implementation)
 - Key SMEs: Talent, HR, Legal Counsel
- Staff and temporary positions only
 - Faculty and academic recruiting uses Interfolio
 - Student positions posted via Handshake



Career



Hiring

655 open job requisitions as of yesterday
Over **11,000** since December 2017

Workday Time Tracking and Absence Management: July 1, 2018

- Previously used Kronos
 - Clunky, user-unfriendly interface
 - Too much downtime
 - Significant issues with accuracy
- Biggest population impact since 2015
 - Time tracking for ~7,500 non-exempt employees
 - Absence management for ~10,000 benefits-eligible employees
 - ...plus the Chicago Paid Sick Leave Ordinance... so everybody!
- Implementation started February 2017
 - Partnered with Deloitte
 - Key SMEs: Compensation, Payroll, Labor Relations, Facilities, 12 bargaining units



Time Off



Time

Workday Learning: March 14, 2022

- Previously used... everything
 - Canvas for safety training
 - Custom-built site for orientation and Workday training
 - Zoom registration for leadership training
 - External vendor for Title IX compliance
 - ...probably more that I don't even know about
- Implementation began September 2021
 - Partnered with Workday via the Jumpstart Services
 - Key SMEs: Digital Accessibility, Finance and Research Administration (first customers!)
- 168 courses covering compliance, HR operations, leadership, professional development, and technology



Learning



HCM Lessons Learned

Lessons Learned

Do More Next Time (What Worked)	Do Less of Next Time (What could change or be better)
Went Live On-Time	Cohesion, support and participation of Executive Sponsors
Mobile Units and Dedicated Post-Production Support	Gaps in Project Management - Turnover
Team was responsive, dedicated and Flexible	“Training ground for Deloitte Resources”, Early shift to the cloud
Workday technology mitigated HR Risks at the University	Severely underestimated effort (PETS, Testing, Academic, etc.)
Pay was over 99% accurate based on converted data	Critical Missteps in Design and Testing within Benefits (Flag, Passive Events)
Delivered core HR services effectively	Campus readiness and change management was underestimated
	Supervisory organization structure and roles were not always correct

Questions



Open questions and discussion



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You will be able to type in your questions for our panelists
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This will **rank order** the questions, and we will answer them (as much as possible) in order

What Questions do you have for University Chicago?

Top



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Break

Will resume at 10:30 a.m. (PT)

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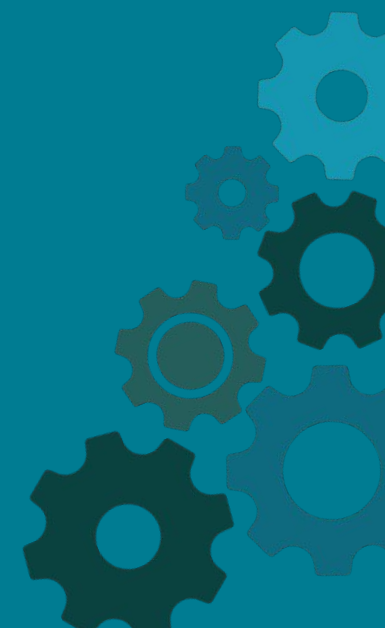
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IVY+ Enterprise Systems Symposium: HCM Session

Penn's Workday Implementation

Date: 9/1/2022

Workday Wave 1

July 1, 2019



Benefits

Benefit administration for Health and Welfare. Integration with TIAA for retirement.



Time

Time reporting for non-exempt workers. Integrated with Accu-Time time clocks.



Time Off

Time off and absence. Including medical, academic leaves, etc.



Recruiting

Recruiting for staff positions. Recruiting for faculty done in Interfolio.



Payroll

Payroll for all workers, including confidential/exec payroll.



Core

Core HCM



Compensation

Including base compensation plans, allowances, one-time payments and period activity pay.



Academics

Academic appointment information, graduate groups, named professorships.

How It Started....



Product Evaluation and Selection

RFI/RFP

- RFI issued to major Cloud vendors
 - Workday
 - Oracle
 - Infor
 - SAP
- RFP Issued to Workday and Oracle
- RFP for System Implementers issues at same time

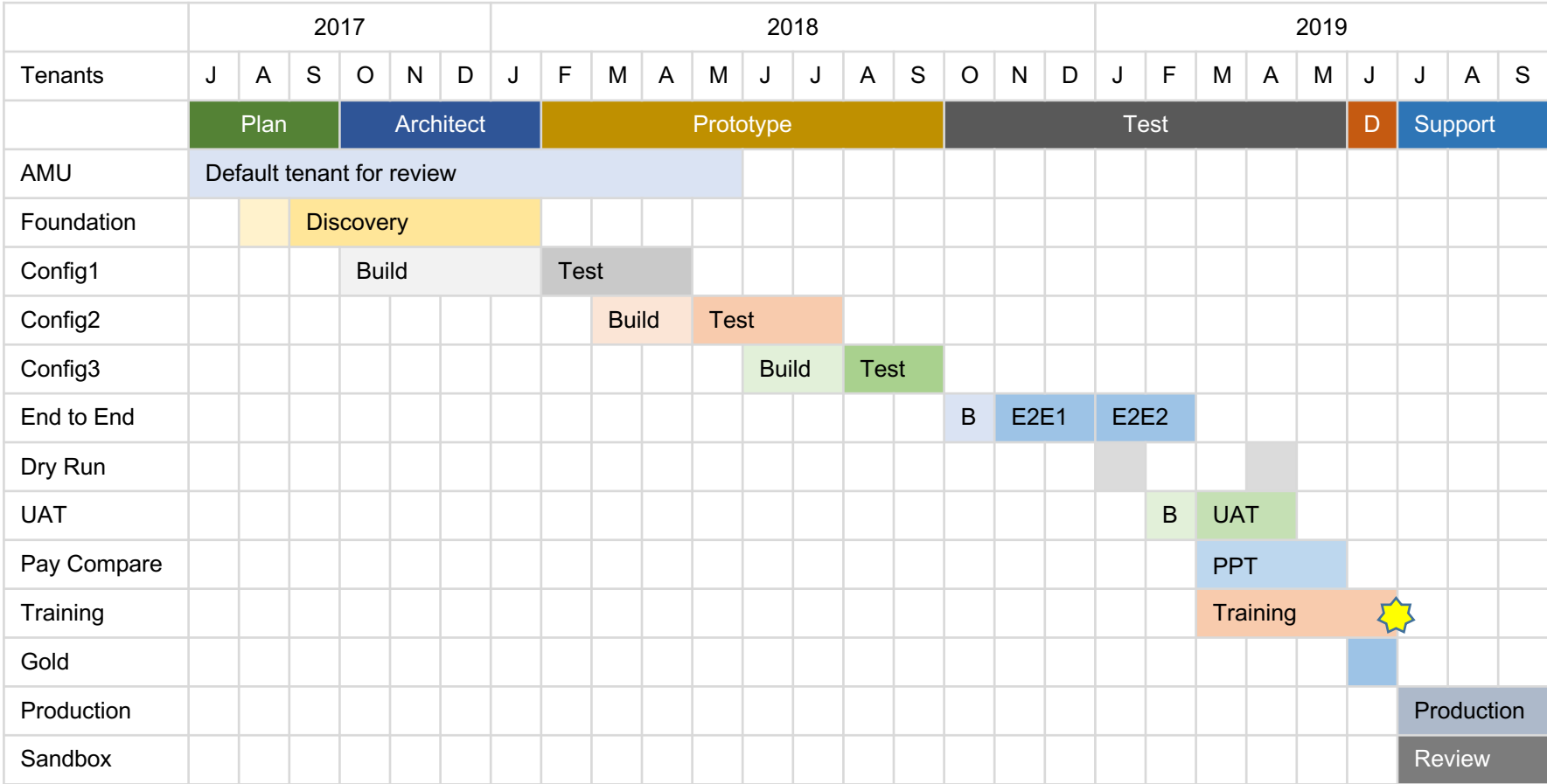
Evaluation

- Review of RFP response
- Oracle and Workday invited for on-site scripted demos (2 days)
 - 100+ attendees
 - Evaluation of each module and task within
- Implementers invited for oral presentations (1 day)

Selection

- Evaluation results scored and weighted
- Brief negotiation and proposal from each vendor
- Full negotiation with Workday based on evaluation results
- Recommendation for product and budget request

Timeline



As of 6/6/19

Project Team

PMO

- Deloitte Program Manager
- Deloitte Project Manager
- Penn Project Manager/Functional Lead
- Penn Project Manager/Functional Lead

Functional Team

- Penn Project Manager/Functional Lead
- Penn Project Manager/Functional Lead
- Deloitte Functional Lead

- Core/Academics (1 Penn)
- Benefits (1 Penn/1 Deloitte)
- Recruiting (1 Penn/1 Deloitte)
- Time and Absence (1 Penn/1 Deloitte)
- Compensation (1 Penn)
- Reporting (1 Penn)
- Security (1 Penn)

Technical

- Deloitte Technical Lead
- Penn Technical Lead
- Data Conversion (1 Penn/2 Deloitte)
- Integrations (1 Penn/various Deloitte)
- Data Warehouse (1 Penn)

Change Management

- Deloitte Lead
- Penn Change Lead
- Deloitte Analysts (variable 1-4)
- Penn Trainer
- Penn Communications Lead

30-40 team members total, not including sponsor/steering groups. All team members were full-time project resources.

Guiding Principles for Workday@Penn

Think “One Penn”

- Do what is best for the University, not just for one school/center.
- Be transparent, collaborative and inclusive.

Be Accountable

- Every data source, process, procedure, and policy requires an owner.

Adopt, Don’t Adapt

- Change the processes, not the software.

Strive for Clarity

- Agree on consistent terms such as headcount and employee transfers.

Keep It Simple

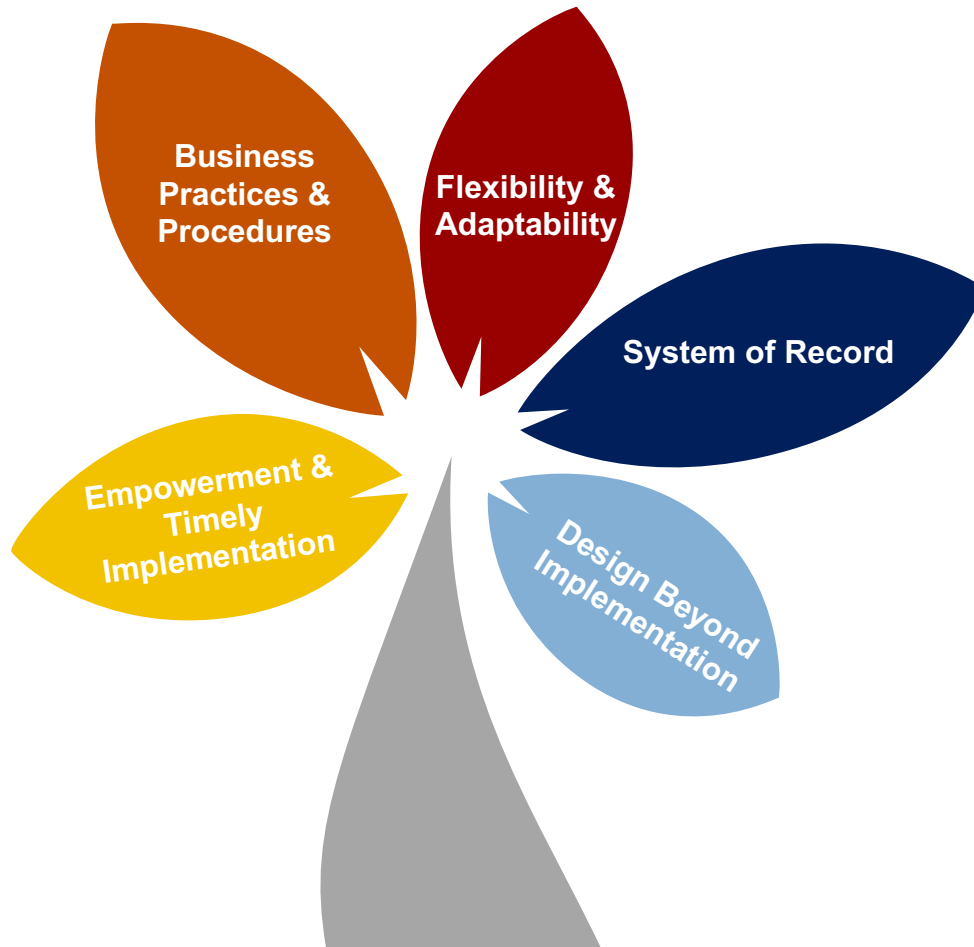
- Minimize data entry and modifications of the same information and shared data in multiple systems.
- Utilize one technology to enable efficient and uniform processes across the University.

Innovate and Improve

- Consider new approaches and ideas
- Monitor and measure services for quality and efficiency, and take corrective action, if needed.

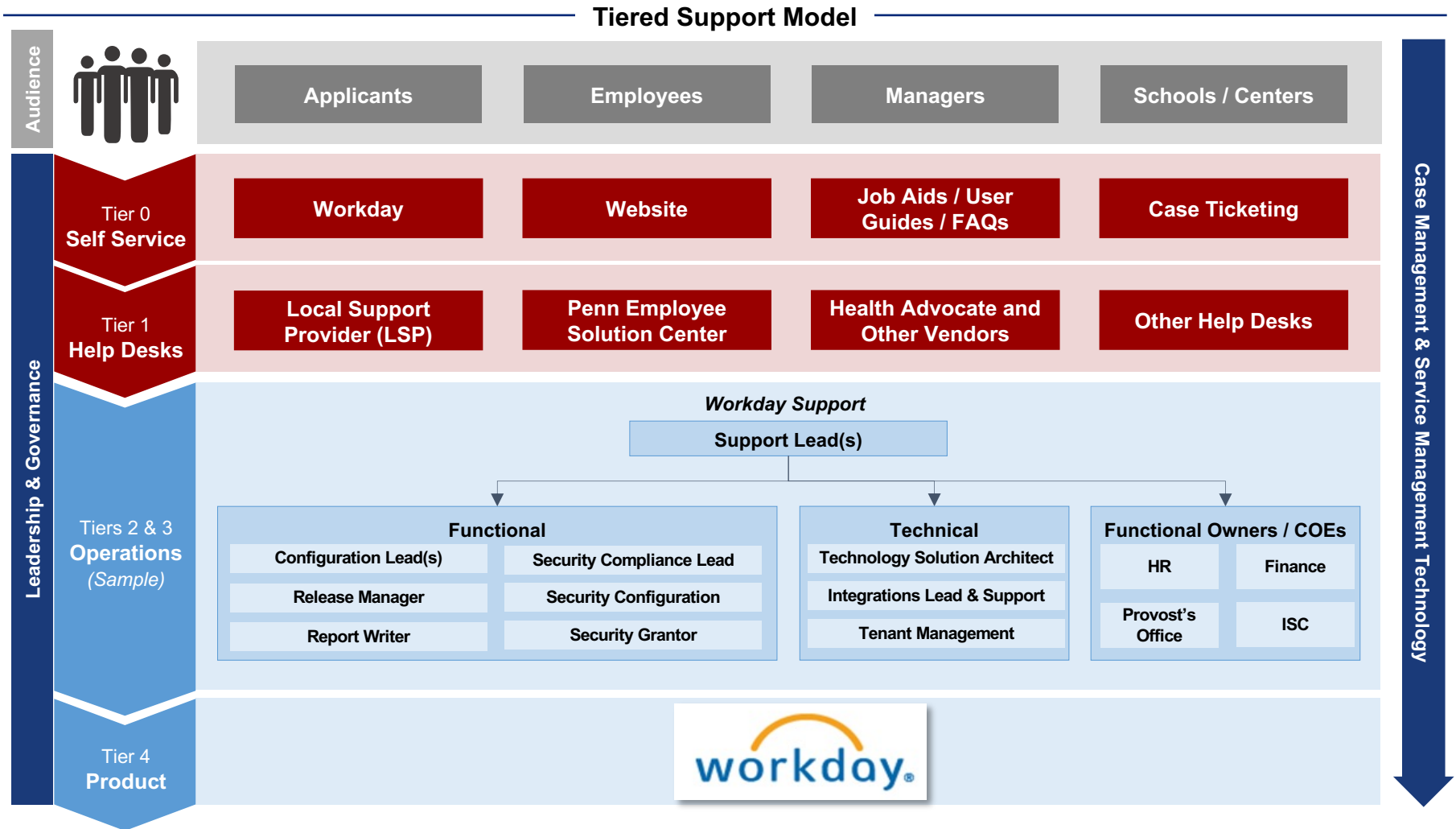
Workday@Penn Design Principles

The following design principles were set at the beginning of the project:



- EMPOWERMENT & TIMELY IMPLEMENTATION** – Project team is empowered to make immediate decisions during Discovery and Design sessions. Committed to new system and redesigned business processes.
- BUSINESS PRACTICES & PROCEDURES** – Penn will implement business practices and procedures as delivered by the software vendor, even when it means changing our current business processes, unless there are significant and compelling reasons to do otherwise.
- FLEXIBILITY & ADAPTABILITY** – Penn will not customize the software and will avoid using third-party point solutions whenever possible, unless the third-party point solution is a preferred partner of Workday.
- SYSTEM OF RECORD** – Workday will be the official, authoritative data source for employee information. Processing externally to Workday will not be the system of record.
- DESIGN BEYOND IMPLEMENTATION** – Minimize the HCM data entry and modifications of the same information and shared data fields in multiple systems. Utilize one HCM technology to enable efficient and uniform processes University-wide.

Support Model



How It Went

What Went Well

- ✓ System is working as intended with minimal “true system” issues. Most problems in the first 90 days are attributed to user error.
- ✓ Minimal off-cycle and manual checks, considering the scope of project. 1.2% needed some manual intervention.
- ✓ Data conversion, although the riskiest part of the project, ended up going very well in the end.
- ✓ Most integrations working as intended. 106 total integrations at go-live.

What Could Have Gone Better....

- ✓ Support was overwhelmed in first two weeks. All hands on deck in call-center.
- ✓ Change Agent Network – communication out was not effective in all areas.
- ✓ While some areas believe training was adequate, it varies depending on School/Center.
- ✓ Some School/Centers did not adequately plan for transformation.
- ✓ Directions pre-go-live were not followed in all areas and led to problem with compensation/payroll.
- ✓ Volume approvals on transactions was unexpected for HR and Budget Partners.
- ✓ Recruitment needed adjustment and further training (not realized for several months)
- ✓ Unanticipated issues with some integrations, mostly around benefits.
- ✓ Issues related to integrations with identity management.

Highlights from Go-Live

The Workday@Penn go live featured collaboration across campus, continuous process and system improvement, and high transaction volume by the University community.

July 2019 Workday Usage Metrics	Value
Log On Sessions	210,796
Unique Users Logged On	20,680
Business Processes Initiated	146,342
Manager Initiated BPs	4,480
Employee Initiated BPs	61,304
Supervisory Orgs	4,737
Open Positions	6,802
Filled Positions	40,636
Leave Events	1,372
Time Off Requests	24,160
Staffing Events	10,823
Compensation Events	13,288
Benefits Events	1,443
Payments Made	63,757

Accomplishments since Go-Live


- ✓ Held 30+ office hour sessions to provide individual assistance to end users and gather feedback for improvements
- ✓ Updated 30+ tip sheets to enhance step-by-step instructions for completing specific business processes and developed additional tip sheets following user feedback
- ✓ Offered 10+ in-person led trainings and transitioned materials for virtual offerings for individuals seeking a refresher on guidance
- ✓ Distributed 10+ Workday@Penn Digest newsletters to keep users informed about important Workday changes + reminders
- ✓ Resolved over 4,000 total submitted tickets to the Solution Center, Tier 2, and Tier 3
- ✓ Celebrated with the Penn Community on August 27th with a reception for 100+ guests

Open questions and discussion



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Upcoming Session Topics

Visit uit.stanford.edu/enterprise-systems-symposium-2022 to stay tuned on dates for these upcoming sessions.

Advancement: *Focus on development and customer relationship management, gift processing, and alumni engagement.*

Infrastructure: *Best practices for business intelligence, reporting (business and operational), middleware, identity management, data management, and data governance.*

Finance: *Lessons learned during the product selection journey, system integrator selection process, and implementation challenges.*

Thank you for attending today's session!

