Agenda
<table>
<thead>
<tr>
<th>Time</th>
<th>Topic</th>
</tr>
</thead>
<tbody>
<tr>
<td>9:00 am</td>
<td>Welcome / President’s address</td>
</tr>
<tr>
<td>9:50 am</td>
<td>HR2020 Update</td>
</tr>
<tr>
<td>10:15 am</td>
<td>Break</td>
</tr>
<tr>
<td>10:30 am</td>
<td>The New HR Organization Design</td>
</tr>
<tr>
<td>11:30 am</td>
<td>Lunch</td>
</tr>
<tr>
<td>12:15 pm</td>
<td>“A Day in the Life” of the New HR Delivery Model and Org Structure</td>
</tr>
<tr>
<td>2:10 pm</td>
<td>Break</td>
</tr>
<tr>
<td>2:20 pm</td>
<td>Next Steps, timing and Q&amp;A</td>
</tr>
<tr>
<td>3:30 pm</td>
<td>Adjourn</td>
</tr>
</tbody>
</table>
HR2020 – Post December Update
Timeline – Phase I

**SEPT ’15**
- **HR 2020 Kick-off**
- **Current State Data Gathering** (Org Structure, Delivery Model, Offerings, Volumes)

**OCT ’15**
- **HR Customer Feedback**

**NOV ’15**
- **HR Function Feedback**

**DEC ’15**
- **HR Strategy Workshop**

**JAN-MAR ’16**
- **Future State Definition**
- **Change Management & Communication**
- **Process Re-design**

**APR – JUL ’16**
HR vs. Customer Views – Importance and Meets My Needs

*Average values are taken only from non-neutral values for both importance and meets my needs.
Customer View – Importance and Meets My Needs vs. Resources

*Averages are taken only from non-neutral values for both importance and meets my needs*
Reception of Services

<table>
<thead>
<tr>
<th>Service</th>
<th>University HR Office</th>
<th>Campus HR Office</th>
<th>Department HR Office</th>
<th>Does Not Apply</th>
<th>Blank</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communication</td>
<td>37%</td>
<td>31%</td>
<td>26%</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Compensation and Benefits</td>
<td>45%</td>
<td>32%</td>
<td>18%</td>
<td>2%</td>
<td>3%</td>
</tr>
<tr>
<td>Employee Relations</td>
<td>28%</td>
<td>35%</td>
<td>26%</td>
<td>7%</td>
<td>4%</td>
</tr>
<tr>
<td>HR Technology</td>
<td>46%</td>
<td>24%</td>
<td>12%</td>
<td>15%</td>
<td>3%</td>
</tr>
<tr>
<td>Organizational Effectiveness</td>
<td>31%</td>
<td>25%</td>
<td>21%</td>
<td>19%</td>
<td>4%</td>
</tr>
<tr>
<td>Talent Management</td>
<td>25%</td>
<td>25%</td>
<td>23%</td>
<td>23%</td>
<td>4%</td>
</tr>
</tbody>
</table>

- 163 (21%) participants receive services only from University HR
- 107 (14%) participants receive services entirely from Campus HR Services
- 45 participants (6%) receive services entirely from Department HR Services
Team Volunteers

Vision and Mission
• Terri Ryckaert
• Deborah McCullough
• Theresa Martin
• Amy Hochstetler

Elevator Speech
• Rebecca Walker
• Keva Rop
• Amy Batule
• Deb Allmayer
• Lisa McVicker
• Sharmin Taylor
Final HR Vision and Mission

Vision

The IU HR community will be a trusted strategic partner driving results that establish IU as a great place to work, learn, and grow.

Mission

The IU HR community supports IU as a premier education and research institution by…
• Fostering a culture of collaboration and inclusion;
• Proactively serving the HR needs of the IU community;
• Providing innovative solutions and exceptional service;
• Hiring, retaining, engaging and inspiring people to excellence and;
• Leading by example.
Let me tell you about an exciting HR initiative…

• HR 2020 is HR’s dynamic pursuit to deliver a transparent 20/20 vision to efficiently fulfill the needs of our customers.

• We need to build an HR Team that fosters a strong culture, grows people and delivers processes that are nimble and adaptive to meet the changing needs of our employees and the institution.

• When we achieve our vision,
  • IU will be an employer of choice
  • Competent and cross-trained HR staff will deliver a positive and caring HR experience.
  • The right resources will be readily available to all with correct and consistent answers every time!

• We can’t make our vision a reality without your help. We need you to…
  • Be open to change and to continue to share your feedback with us!
  • Be excited – together, we are creating the future that we all want!

• You can count on us to…
  • Transparently communicate our progress; hold us accountable to our commitments and timelines in our work plans
  • Refer to the HR2020 website for updates or contact any HR team for more information
Summary – HR Community HOPES

- Successful change
- Make it a reality
- One team, unified and consistent
- More communication, collaboration and clarity
- Innovation / reinvention
- Streamlined processes
- Personal growth / development
- Feel valued, recognized and rewarded
- Create value, regarded as leaders / role model at IU
Summary – HR Community FEARS

- Nothing will change
- Massive effort required; will take forever
- Change without impact
- Job loss or demotion
- One size fits all; Bloomington-centric
- No investment in HR resources
- No buy-in; lack of senior leadership support
- HR not valued by senior leadership to have a seat at the table
President Michael A. McRobbie
Rapid Relate Activity
INVEST
Hey, this project loans itself to 🧠 ’s talents. I should ask her to be on my team!
HR2020 – Post December Update
HR Steering Team

- John Whelan
- Susan Brewer
- Christian Royer
- Rob Springfield
- Suzanne Ryan
- Laura Kress
- Julie Cline
- Deb Dunbar
- Juletta Toliver
- Jennifer Chaffin
- Jamie Gayer
- Chris Lucas
- Deb Allmayer
- Sara Peterson
- Terri Ryckaert
- Kathy Shepley
- Ray Kliweer
- Mianta’ Diming
- Ray Klein
- Gabby VanAlstine
- Deborah Schmitt
- Andrew Lenhardt
<table>
<thead>
<tr>
<th>HR Steering Team</th>
<th>HR Ambassadors</th>
<th>HR Community</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wednesday, June 1, 2016 Indianapolis</td>
<td>TBD</td>
<td>Wednesday, April 27, 2016 Bloomington</td>
</tr>
<tr>
<td>Tuesday, August 2, 2016 Bloomington</td>
<td></td>
<td>Wednesday, November 2, 2016 Indianapolis</td>
</tr>
<tr>
<td>Tuesday, October 4, 2016 Indianapolis</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wednesday, December 7, 2016 Bloomington</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Strategic Priority</td>
<td>Strategic Goal</td>
<td>Short Term</td>
</tr>
<tr>
<td>-------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>------------</td>
</tr>
<tr>
<td><strong>Collaborative HR Community</strong></td>
<td><strong>HR Organization Redesign</strong>&lt;br&gt;Design and implement an HR Organization Delivery Model and Structure that meets customer needs.</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>HR Competency Framework</strong>&lt;br&gt;Develop and implement an HR Competency Framework to be used in all aspects of HR talent management, specifically hiring, training and development, career path progression, succession planning etc.</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>HR Professional Development</strong>&lt;br&gt;Create and implement an HR Professional Development program.</td>
<td></td>
</tr>
<tr>
<td><strong>HR Organization and Team Development</strong></td>
<td><strong>HR Community Engagement</strong>&lt;br&gt;Define and implement initiatives aimed at fostering a stronger, more collaborative culture within HR.</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>HR Career Path</strong>&lt;br&gt;Define and implement an HR career path that allows for cross training and career progression within the HR delivery model.</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>HR Mentoring Program</strong>&lt;br&gt;Develop and implement an HR mentoring program.</td>
<td></td>
</tr>
<tr>
<td>Strategic Priority</td>
<td>Strategic Goal</td>
<td>Short Term</td>
</tr>
<tr>
<td>---------------------------</td>
<td>-------------------------------------------------------------------------------</td>
<td>------------</td>
</tr>
<tr>
<td><strong>Customer Service</strong></td>
<td><strong>HR Operations (Shared Service Center)</strong></td>
<td>X</td>
</tr>
<tr>
<td></td>
<td>Design and implement an HR Operations center, including a call center, ticket system, knowledge base and HR portal with self-service tools.</td>
<td></td>
</tr>
<tr>
<td><strong>Engaged Employees</strong></td>
<td><strong>Employee Survey</strong></td>
<td>X</td>
</tr>
<tr>
<td></td>
<td>Develop and implement an all employee survey.</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Key HR Metrics</strong></td>
<td>X</td>
</tr>
<tr>
<td></td>
<td>Create key HR Metrics to measure the efficiency and effectiveness of HR.</td>
<td></td>
</tr>
<tr>
<td>Strategic Priority</td>
<td>Strategic Goal</td>
<td>Short Term</td>
</tr>
<tr>
<td>-------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>------------</td>
</tr>
<tr>
<td>Process Efficiency</td>
<td><strong>Compensation Philosophy Definition and Structure Re-design</strong>&lt;br&gt;Define and design the compensation philosophy, structures and administrative policies across IU, including the structure, market position, benchmark jobs, job evaluation, reclassification and awarding increases. (starting with non-support staff)</td>
<td>X</td>
</tr>
<tr>
<td></td>
<td><strong>Recruitment Re-design</strong>&lt;br&gt;Review/Redesign the recruitment policies and process from position budgeting/approval through offer acceptance. Re-design the search committee process across all of IU, including a common set of guidelines.</td>
<td>X</td>
</tr>
<tr>
<td></td>
<td><strong>New Employee Orientation Process Re-design</strong>&lt;br&gt;Creation of a university-wide orientation process for all employees.</td>
<td>X</td>
</tr>
<tr>
<td></td>
<td><strong>Leadership Development – Manager/Supervisor Development</strong>&lt;br&gt;Create a comprehensive Manager/Supervisor training program for all levels of proficiency that can be used across all of IU.</td>
<td></td>
</tr>
<tr>
<td>Strategic Priority</td>
<td>Strategic Goal</td>
<td>Short Term</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>---------------------------------------------------------------------------------</td>
<td>------------</td>
</tr>
<tr>
<td>Process Efficiency</td>
<td><strong>New Performance Management System</strong> Create a new performance management system with clear philosopy and guidelines for administration.</td>
<td></td>
</tr>
<tr>
<td>Process / Solution Improvements</td>
<td><strong>Learning Management System</strong> Select and implement an LMS for all IU training, including compliance.</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>University-wide Functional Career Paths</strong> Define and implement functional career paths across the university.</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Mentoring Program</strong> Develop and implement an HR mentoring program.</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Succession Planning</strong> Develop a succession planning process with guidelines to be used across all of IU.</td>
<td></td>
</tr>
</tbody>
</table>
Guiding Principles for Organization Design

- Does it meet the needs of the people we support?
- HR should be easy and intuitive
- Be collaborative; promote teamwork
Final Org Design Criteria

• Enhances our ability to hire and retain the best talent

• Fosters delivery of policies, programs and processes that are derived from a defined set of guidelines with some freedom within a shared framework

• Streamlines and reduces duplication

• Provides all HR customers with one consistent, customer centric HR experience no matter where they access services.

• Provides HR customers with accurate, timely and effective communication

• Pushes decisions down to the lowest level - with clear parameters, roles, responsibilities and accountability

• Clearly define roles, responsibilities and reporting lines

• Creates career paths and development opportunities for HR talent

• Fosters collaboration and inclusion
<table>
<thead>
<tr>
<th>HR Service Delivery Model Options</th>
<th>Design</th>
<th>1&lt;sup&gt;st&lt;/sup&gt; Choice</th>
<th>2&lt;sup&gt;nd&lt;/sup&gt; Choice</th>
<th>3&lt;sup&gt;rd&lt;/sup&gt; Choice</th>
<th>Criteria</th>
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<tbody>
<tr>
<td>Model #1</td>
<td><img src="image1.png" alt="Diagram" /></td>
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<td>4</td>
<td>1.72</td>
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<td>3</td>
<td>1.72</td>
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<td>Model #3</td>
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<td>5</td>
<td>1.85</td>
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<td>Model #4</td>
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<td>6</td>
<td>5</td>
<td>1.86</td>
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<td>11</td>
<td>5</td>
<td>2</td>
<td>2.07</td>
</tr>
</tbody>
</table>
HR Delivery Model

- STAFF MEMBER
- HR OPERATIONS
  - CENTRAL & RC/CAMPUS?
- COE
  - CENTRAL & RC/CAMPUS?
- HR DEPT/UNIT (RC/CAMPUS)
  - LEADERS
    - EVERY UNIT COVERED
HR Delivery Model

Entry #1
Call Center
phone or email

Entry #2

HR Operations
Process Experts

HR Business Partners

Customer

Transaction
Partnership

HR Center of Expertise (COE)

Tiered system
0 - self-service
1 - single interaction
2 - routine, more than one interaction
3 - deeper interaction, send to COE

Front Line Goals
• Process efficiency
• Quick response
• HR customer service experts
• 80/20: answered/passed to COE
• Ticketing, auto call distribution

Business partners include
• Regional campus HR offices
• Department HR Reps

They can
• Embed w/ customer group
• Know the business culture
• Employee relations
• Identify issues – won’t solve all problems
• More consistent role

Designers
• Benefits
• Compensation
• Employee Relations
• Org Development
More change than meets the eye…

• The HR strategy and priorities have been collectively developed by a representative university-wide leadership team using customer feedback gathered from the surveys.

• Sr. HR Business Partners roles have been created to align the development of HR strategy to support unit/RC and campus strategies all the way up to the most senior levels of university leadership.

• The new HR Operations center will provide university-wide service delivery, technology and reporting support to all units/RCs/campuses.

• HR Business Partners will not operate independently, rather they will partner with COEs and HR Operations to drive consistent service.

• Policies and programs will be congruent with customer needs. HR Business Partners will no longer ‘design’ their own programs when they should be university-wide, like new employee orientation, supervisor training, etc.

• COEs will no longer process transactions.

• A new role has been created to that the implementation of the HR strategy and HR2020 is planned, tracked and involves the entire HR community along the way.
## HR Delivery Model - Key Areas of Focus

<table>
<thead>
<tr>
<th>HR Business Partner (HRBP)</th>
<th>Center of Expertise (COE)</th>
<th>HR Operations (HR Ops)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Defining Needs / Leading Action</strong></td>
<td><strong>Designing Solutions</strong></td>
<td><strong>Delivery / Execution</strong></td>
</tr>
<tr>
<td>• Acts as the primary Relationship Manager for the client</td>
<td>• Designs and develops HR programs, policies and services across the organization</td>
<td>• Focuses on standardization</td>
</tr>
<tr>
<td>• Provide strategic HR counsel</td>
<td>• Prioritizes activities based on client needs (input from Business Partners)</td>
<td>• Processes administrative and transactional activities across all HR functional areas.</td>
</tr>
<tr>
<td>• Identify client’s HR needs and seeks solutions from HR Expertise and HR Services</td>
<td>• Designs and transfers technology and best practices across the organization</td>
<td>• Delivers against set service level agreements</td>
</tr>
<tr>
<td>• Address common HR issues across clients</td>
<td>• Provides expertise and support in areas such as Talent Acquisition, Training and Development, Organization Development, Succession Planning, Compensation, Benefits, Communication and HR Technology</td>
<td>• Applies best practices in transactions and administration</td>
</tr>
<tr>
<td>• Understand the “pulse” of the organization</td>
<td></td>
<td>• Manages data integrity and reporting</td>
</tr>
<tr>
<td>• Develops the culture of the organization</td>
<td></td>
<td>• Implements HR Technology support for all HR processes.</td>
</tr>
</tbody>
</table>

**HR Business Partners are not…**
- Transaction administrators
- Creators and developer of programs
- Middlemen
- Sources of all information
- Policy makers
- Exception makers for standardized processes

**HR Expertise resources do not…**
- Deliver services to the organization alone, but rather through others
- Administer plans
- Interface with end users day-to-day, unless brought in by an HR Business Partner

**HR Operations resources do not…**
- Design programs, plans or interventions
- Set policy
- Develop process strategy, but may participate in process design
Indiana University Human Resources Function
High Level Organization Structure

**Sr. Director, HR Operations**
- Delivery/Execution

**HR Technology**

**Self Service & Tier I - Advise**
- Tier II – Consult / Case Management

**Centers of Expertise – 6**
- Designing Customer Solutions
  - Director, Benefits
  - Director, Compensation
  - Director, Employee and Labor Relations
  - Director, Talent Acquisition
  - Director, Talent and Organization Development
  - Director, Wellness

**HR Business Partners – 4 Lead Roles**
- Defining Customer Needs and Building Talent and Organization Capabilities
  - Sr. Director HR, Bloomington
  - Sr. Director HR, Indianapolis
  - Sr. Director HR, University-wide Admin & Regional Campuses
  - Sr. Director HR, School of Medicine

**Director, HR Business Administration**
- Designing Business Administration solutions and supporting the entire HR operation.

**Director, HR Capability, Analytics and Strategic Initiatives** (includes Communications)
- Building HR capabilities across the function and project management of all Strategic HR initiatives.
Indiana University Human Resources Function
High Level Organization Structure

Sr. Director, HR Operations
Laura Kress

Director, Benefits
Susan Brewer

Director, Compensation
OPEN POSITION

Director, Employee and Labor Relations
Suzanne Ryan

Director, Talent Acquisition
OPEN POSITION

Director, Talent and Organization Development
Deb Dunbar

Director, Wellness
Patty Hollingsworth

Sr. Director HR, Bloomington
OPEN POSITION

Sr. Director HR, Indianapolis
Juletta Toliver (Interim)

Sr. Director HR, University-wide Admin
Rob Springston

Sr. Director HR, School of Medicine
Ray Kliewer

Director, HR Business Administration
Julie Cline

Director, HR Capability, Analytics and Strategic Initiatives
Christian Royer
An HR Business Partner…

- HR lead for the unit doing the following:
  - Defines HR strategy
  - Builds HR capabilities
  - Develops strategy for workforce planning, talent acquisition, employee engagement and culture
  - Leads organization design & development
  - Identifies key HR issues and facilitates solutions
- Partners with COEs to design solutions to meet the needs of the unit and the university
- Partners with HR Operations to deliver solutions and understand customer needs
- Brings in the expert services of the COEs
- Manages strategic relationships within the unit and across the university

IS NOT…

- Operating independently in silos
- Providing transactional support
- Delivering services alone; with HR Ops
- A specialist with deep functional expertise; more of a generalist
- Designing solutions independently

KEY RELATIONSHIPS:

- Partners with Sr. HRBPs, HR AVP and other HRBPs across IU
- Influences unit leadership teams
- Partners with Affirmative Action, Legal, Finance, Diversity/Inclusion and others
- Collaborates with COEs on design
- Collaborates with staff, faculty and students
A Senior HR Business Partner…

- Key liaison role responsible for consistent HR service delivery across the university
- **Primary** point of contact for assigned senior leaders of the university; defines the overall HR strategy to support the strategy of the unit(s) they lead (Vice Presidents - Exec/Sr./VP)
- Coordinates with all HRBP practitioners across their assigned unit(s) to build HR capabilities and delivery HR support
- Partners with COEs to design solutions to meet the needs of the university
- Manages strategic relationships within their units and across the university

IS NOT…

- A silo or an additional layer of management
- Meant to replace the direct accountability current HRBPs have to their assigned leaders
- Excluded by HRBPs when delivering solutions
- A specialist with deep functional expertise; more of a generalist
- Working directly with staff, faculty and students

KEY RELATIONSHIPS:

- Partners with HR AVP and other HRBPs across the university
- Influences unit leadership teams (direct reports to the Vice Presidents)
- Partners with Affirmative Action / Office of Equal Opportunity, Legal, Finance, etc.
- Collaborates with COEs on design
AREAS OF RESPONSIBILITY...

- Develop HR strategy to support unit strategy
- Key linking role to ensure consistency
- Client relationship management
- Diagnosing and defining client needs
- Building HR capabilities
- Employee engagement and culture assessment
- Organization design and development
- Change management consulting
- Workforce planning
- Talent acquisition
- Talent development
- Employee relations / labor relations
- HR program communications

SNAPSHOT OF TYPE OF WORK...

- Leads employee engagement initiatives
- Connects strategic priorities to the work
- Delivers employee relations support
- Implements compensation strategies
- Implements performance management
- Defines employee development initiatives
- Defines recruitment strategy; assesses and selects talent
- Collaborates with unit leadership
- Works with leaders and employees to meet goals of the unit
- Defines HR metrics and analytics for unit
- Manages day-to-day crises as they arise
Centers of Expertise
Designing Customer Solutions

A CENTER OF EXPERTISE…

• Designs and develops HR programs, policies and services across the university
• Establishes the strategy and methodologies for each HR functional discipline across the university
• Acts as the steward for prudent management of the university resources and risks
• Prioritizes activities based on the needs across the organization (input from HRBPs)
• Designs solutions based upon best practices across the organization / identifies trends
• Guides HRBPs and HR Ops on delivery of new programs and services
• Seeks feedback from HRBPs and HR Ops on program effectiveness
• Provides expertise and support in functional disciplines

IS NOT…

• Designing and developing solutions incongruent with customer needs and independent of HRBP input
• Delivering services to the organization autonomously
• Providing day-to-day administration
• Interfacing with end users day-to-day, unless brought in an HRBP

KEY RELATIONSHIPS:

• HRBPs and HR Ops on policies, programs and solutions
• HR Capability on communication
• HR Business Admin on budget
• Coordinate with Finance, Legal, Faculty and Staff Councils, Unions, Affirmative Action / Office of Equal Opportunity, Academic Affairs, etc.
AREAS OF RESPONSIBILITY...

- Benefits plan design, policy and process development
  - Health & Welfare Benefits (health, dental, vision, life, COBRA)
  - Retirement
  - Defined Contribution Plans
  - Other Benefits (EAP, Tuition)
  - Group Insurance / Disability Plans
- Student insurance plan administration
- Executive benefits administration
- Compliance
  - ACA
  - HIPPA
- Vendor Management, Compliance and Reporting

SNAPSHOT OF TYPE OF WORK...

- Designing and planning Open Enrollment; looking at tier and cost structure for employees/dependents/families
- Conducting a study of our retirement benefits against other institutions to assess best practice
- Assessing the usage of the current benefits plans and recommending new programs / enhancements based upon best practices i.e.) tuition, leaves
- Providing on-site lunch and learn program on how to use your HSA card effectively
AREAS OF RESPONSIBILITY...

• Wellness policy and program development
• Healthy IU
• Health and wellness metrics
• Vendor Management, Compliance and Reporting

SNAPSHOT OF TYPE OF WORK...

• Piloting a Diabetes Prevention Program and Tai Chi and yoga program through UITS, Library, etc.
• Hosting a 1:1 sessions on nutritional counseling on-site

Note: There will also be a Center of Expertise for Wellness led by Patty Hollingsworth. The Wellness team is going to report to HR to build one integrated health strategy for the university. This is a new change, more details on the specific work of the Wellness COE will be outlined in the weeks to come.
AREAS OF RESPONSIBILITY…

- Compensation plan design, policy and process development
- Incentive plan design
- Reward and recognition plans
- Market Analysis / Salary Surveys
- Job evaluation / classification
- Development of salary administration guidelines and processes (merit, additional pay, off-cycle adjustments, etc.)
- Executive compensation
- FLSA / DOL compliance
- Vendor Management, Compliance and Reporting

SNAPSHOT OF TYPE OF WORK…

- Evaluating the current salary structure to determine where IT salaries in comparison to the market
- Working with facilities departments to develop career path/job families in the trades; partnering with the Talent and Organization Development COE
- Working in partnership with Finance to develop compensation guidelines
- Collaborate with Affirmative Action/Office of Equal Opportunity and HRBPs regarding equity pay
AREAS OF RESPONSIBILITY…

• Policy and program development, interpretation, review and oversight
• Labor management, negotiations and grievances
• Leaves of absence and other time off programs
• FMLA policy and process
• ADA administration
• Worker’s compensation
• Unemployment compensation
• Discipline / Corrective action
• RIF, Terms, Severance
• Vendor Management, Compliance and Reporting

SNAPSHOT OF TYPE OF WORK…

• Developing an attendance management program with individual departments on criteria for addressing attendance problems
• Advising on unit restructuring that involves reduction-in-force, possible severance options, outplacement services and counseling
• Establishing a committee to explore developing a consistent FMLA policy across the university
AREAS OF RESPONSIBILITY…

• Talent acquisition policy and program development
• Employment Branding
• Workforce Planning
• Recruiting
• Sourcing / Pipeline development
• Candidate Experience
• Talent Assessment
• Search Committees
• Onboarding / Orientation
• Metrics and Reporting
• Vendor Management, Compliance and Reporting

SNAPSHOT OF TYPE OF WORK…

• Leading a team designing selection assessment tools and how and when best to use them, such as (when to use and composition of a search committee, behavioral-based interview guide)
• Completing the RFP for new reference checking vendor
• Developing a new talent acquisition dashboard to understand metrics (time to fill, ROI on sourcing channel)
• Develop a university-wide sourcing strategy including social media and developing pipeline for talent
AREAS OF RESPONSIBILITY...

• Talent management policy and program development
• Performance Management
• Succession Planning
• Career paths / development
• Competency development
• Engagement / Org culture
• Organization design and development
• Team building
• Leadership / Management Development
• Training – competency development, general and functional skills
• Vendor Management, Compliance and Reporting

SNAPSHOT OF TYPE OF WORK...

• Designing performance management principles and tools
• Developing an HR competency model and career paths for professional development in partnership with HR Capability area
• Working with UITS HRBP to design team-building between application developers and their functional partners
• Design a competency development series for clinic professionals
• Design and implement an emerging leaders training program
HR OPERATIONS IS…

- Standardized processes
- Consistent and accurate response
- Increased efficiencies
- One-stop support for employee customer service
- Establishes and implements the technology strategy and provides delivery of HR technology solutions
- Provides process design expertise to COEs when developing solutions
- Develops reporting tools and capabilities for COEs and HRBPs

IS NOT…

- A function that sets policies, develops programs or handles employee relations cases

KEY RELATIONSHIPS:

- Provides COEs and HRBPs with info on calls / issues / trends
- Receives guidance from COEs on new programs and services
- Provides HRBPs with feedback on services provided to employees
- Works closely with HR Capability area on employee communications and web presence
- Partner with UITS, Legal, Finance, Academic Affairs, etc.
AREAS OF RESPONSIBILITY...

• Tier 0
  - employee and manager self-service

• Tier 1
  - one phone #; one email – similar to UITS
  - transactional processing
    (e-docs, separation & additional pay)

• Tier 2
  - Case management / complex questions
    (Benefits, Retirement, etc.)

• HR Technology Services
  • Enterprise system support
  • Reporting services
  • Data security and access provisioning

SNAPSHOT OF TYPE OF WORK...

• Answering basic questions on HR policies and services from a caller, walk-in or email inquiry from a customer

• Designs and implements call tracking and ticketing system to support HR service delivery

• Counseling an employee and manager through a basic leave of absence case

• Processing e-docs for a unit (hires, separations, etc.)

• Building new reporting tools to support benefit programs

• Escalating a policy exception request to a COE

• Notifying an HRBP of a possible ER issue
HR Administration Functions
Designing solutions and supporting the entire IU HR operation

HR BUSINESS ADMINISTRATION

AREAS OF RESPONSIBILITY…

• Finance and Budget
• Purchasing, Billing and Accounting
• Office Management
• Administrative Support
• Contract management (vendors)
• Internal audit / Compliance supervision
• Auditing and response
• Severance (partner with Employee Relations)
• Corporate Citizenship
• Vendor Management, Compliance and Analytics

SNAPSHOT OF TYPE OF WORK…

• Coordinate the administration of severance agreements and payments with HRBPs and Legal
• Partner with Procurement on all HR vendor contracts
• Lead the development and administration of the overall UHR budget
• Coordinate the spend on HR memberships and associations
HR CAPABILITY, ANALYTICS & STRATEGIC INITIATIVES

AREAS OF RESPONSIBILITY...

- HR Business Partner for HR
- Lead the HR organization redesign and implementation
- HR Strategy oversight, program and project management
- HR scorecard, metrics and data analytics
- Building HR Capabilities
- HR process re-design
- Vendor Management, Compliance and Analytics
- HR Communications
  - Branding, Presentations, Social Media, Web Presence, HR Community Communications

SNAPSHOT OF TYPE OF WORK...

- Participating in the assessment, selection and orientation of HR talent
- Acts as the Program Management office with oversight, tracking of all strategic projects, timing, resource allocation, etc.
- Creates scorecards for measuring HR service delivery effectiveness
- Leads the project teams - Building HR Community and HR Development
- Partners with Communications to brand the HR customer experience
- Partners with the COEs to design communication for program offerings
- Coordinates HR Steering Team and HR community meetings
“A Day in the Life” Activity

- **Participants have been assigned to a station (see your name tag)**
- **Groups will rotate between 4 stations (25 min each; 5 min in between)**
  - Station A – 12:15 pm – 12:40 pm
  - Station B – 12:45 pm – 1:10 pm
  - Station C – 1:15 pm – 1:40 pm
  - Station D – 1:45 pm – 2:10 pm
- Each station will include example scenarios that describe the roles in each area of the model - HRBP, COE, HR Ops, HR Business Admin/HR Capability
- Begin at your assigned station and move to the next letter in alphabetical order. Those that begin at station D will go to station A next.
- During the activity, write down any questions you have on the index card provided (one question per card)
- After each station presentation, drop index cards with questions in the basket provided at each station
“A Day in the Life”
Activity
Getting from the Current State to the Future State Organization Design
A Moment to Reflect…

• How do you imagine the new HR organization model furthering your success as an HR professional?

• In what ways can you help build a strong and effective partnership between…
  • HRBPs and COEs
  • HR Ops and HR Ops
  • COEs and HR Ops

• As you envision the new HR Organization, how do you see yourself helping to “tie it all together”?
<table>
<thead>
<tr>
<th>Activity</th>
<th>Timing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complete org design</td>
<td>April 2016</td>
</tr>
<tr>
<td>- <strong>Wave 1</strong></td>
<td></td>
</tr>
<tr>
<td>- Leadership Level</td>
<td></td>
</tr>
<tr>
<td>- High level org structure</td>
<td></td>
</tr>
<tr>
<td>- Announce</td>
<td></td>
</tr>
<tr>
<td>- Finish complete org structure</td>
<td></td>
</tr>
<tr>
<td>- Announce high level structure and timing</td>
<td></td>
</tr>
<tr>
<td>- <strong>Wave 2</strong></td>
<td>May/June 2016</td>
</tr>
<tr>
<td>- Leadership + 1 below</td>
<td></td>
</tr>
<tr>
<td>- Directors/Managers</td>
<td></td>
</tr>
<tr>
<td>- <strong>Wave 3</strong></td>
<td>June 2016</td>
</tr>
<tr>
<td>- Remaining org</td>
<td></td>
</tr>
<tr>
<td>- All roles announced</td>
<td>July 1, 2016</td>
</tr>
</tbody>
</table>
## Current to New Design - Impact to Roles and People

<table>
<thead>
<tr>
<th>Types of Impact to Roles</th>
<th>What Happens</th>
</tr>
</thead>
<tbody>
<tr>
<td>Little or No Change</td>
<td>Incumbent remains in the position</td>
</tr>
<tr>
<td>(includes increased volume; reporting changes, etc.)</td>
<td></td>
</tr>
<tr>
<td>New</td>
<td>Position gets posted</td>
</tr>
<tr>
<td>(role does not exist today)</td>
<td></td>
</tr>
<tr>
<td>Combined</td>
<td>Assess and select from current incumbents at the same level performing or have recently performed the work</td>
</tr>
<tr>
<td>(two roles get combined into one)</td>
<td></td>
</tr>
<tr>
<td>Redundant</td>
<td>Identify other roles the incumbent is qualified to perform</td>
</tr>
<tr>
<td>(fewer of the same role are needed)</td>
<td></td>
</tr>
<tr>
<td>Redesigned</td>
<td>(Assess and Select or Apply)</td>
</tr>
<tr>
<td>(role is 60% different than today)</td>
<td></td>
</tr>
<tr>
<td>Eliminated</td>
<td></td>
</tr>
<tr>
<td>(role today does not exist in new org)</td>
<td></td>
</tr>
</tbody>
</table>
HR Steering Team Q&A
A Moment to Reflect…

• How do you imagine the new HR organization model furthering your success as an HR professional?

• In what ways can you help build a strong and effective partnership between…
  • HRBPs and COEs
  • HR Ops and HR Ops
  • COEs and HR Ops

• As you envision the new HR Organization, how do you see yourself helping to “tie it all together”? 
Adjourn