Transforming HR Service Delivery

The University’s implementation of PeopleSoft is fundamentally changing how we work. This change, partnered with the Chancellor’s commitment to pursuing opportunities to maximize the efficiency and effectiveness of our operations and the Carolina Counts initiatives, has provided the opportunity to transform how HR services are delivered.

In considering this unique prospect for transformational change, the Office of Human Resources (OHR) believes that it is essential to focus our efforts on how service is delivered, and who delivers it. This effort will be designed to ensure that there are appropriate levels of training, communication and responsibility in campus HR organizations, as well as accountability for the services provided.

This change is designed to:

• maintain a decentralized approach to HR service delivery — but one that is less broadly distributed within units than currently exists
• ensure the campus community continues to receive outstanding HR service from OHR and from school/division HR personnel
• strengthen the lines of communication between each unit and OHR

Key changes in the service delivery model include:

• redefined roles for campus HR representatives
• a redefined role and a new name for the HR Administrative Advisory Council (HRAAC)
• a new approach to communication between OHR and campus

The New Campus HR Roles

PeopleSoft does many things well, but it does not have the same built-in checks and balances our legacy HR systems do. These systems were custom-tailored to our processes, while PeopleSoft was built to accommodate a variety of ways of doing business. Bottom line: it’s easier to make errors in PeopleSoft, and those errors can have immediate ripple effects on employee pay and benefits. To avoid making errors, users must be well-trained and must use the system frequently to maintain their skills.

For this reason, OHR has developed a user model based on “complex” and “simple” transactions. Simple transactions include:

• salary source changes
• student actions
• lump sum payments

Schools/divisions will determine who can initiate these simple transactions in PeopleSoft. OHR will not limit the number of users who can initiate these actions; however, all such users must complete required training before receiving access to the system.

All other HR actions are defined as “complex.” To ensure that users are well-trained and understand not only PeopleSoft, but also the underlying HR policies and procedures, OHR will limit how many users each school and division will have to handle these complex HR actions. The number of users given this “full access” will be based on a metric of one user for every 125 complex actions originated within the unit in 2011-12. Having a defined number of users, with required training and ongoing monitoring, will help ensure that complex HR actions are originated only by knowledgeable users who handle a sufficient volume of actions to be proficient. Within their allocations, schools and divisions will have the flexibility to consider the organizational design that most appropriately meets their needs for effective and efficient service delivery.
As part of this change, OHR has redefined campus HR roles to be located primarily at the school and division level. The role of the departmental HR Facilitator will be replaced by the following structure:

**HR Director/Manager**

The HR Director/Manager directs and is accountable for HR operations for a school, division, or a shared service cluster across organizational units. This role is typically at the School/Division level and reports to the Dean or Vice Chancellor, or the unit’s chief administrative officer. This person is the primary liaison for HR matters between his or her work unit and University central offices, and serves as an advocate to and active participant in the University’s community of HR professionals. In PeopleSoft, the HR Director/Manager can initiate and approve complex HR transactions. (This role will have full PeopleSoft access, but is not included in the total number of complex access users allocated to the school or division.)

**HR Associate**

This role is dedicated full-time to HR responsibilities and is accountable to the HR Director/Manager. The HR Associate provides HR consultation and technical expertise on one or more HR disciplines (such as employment). As a result, this role requires a high level of HR knowledge. In PeopleSoft, the HR Associate initiates and approves HR transactions, provides post audit reviews, and provides reports to leadership.

**HR Coordinator**

This role is dedicated full-time to HR responsibilities and is accountable to the HR Director/Manager. The Coordinator provides general HR policy and resource referrals for employees, originates complex actions in PeopleSoft, and may approve basic actions originated at the department level.

Only individuals in the above roles will be given “full” access to PeopleSoft to originate complex HR actions for a school/division. Responsibilities and expectations have been established for each of the three HR roles to ensure consistency and clarity and to help schools/divisions ensure the roles are filled by employees with the required expertise. This structure also provides room for growth within schools and divisions, and across the University. Training (both system-related and HR policies and procedures) will be required for all three levels.

**Making the Transition**

Between now and the first quarter of 2013, school/division leadership will determine how this structure will be implemented in their organization, including who will fill their allocation of HR roles. They will work closely with the Office of Human Resources as they transition to this new model, consulting primarily with OHR Classification and Compensation to determine the most appropriate classification for each position.

We expect that the changes will be phased in to allow sufficient time for a well-planned and coordinated transition. Schools and divisions may choose to roll out these changes as early as their individual situations may allow. This new HR service delivery model will need to be in place by no later than the January 2014 go-live date for the HR/Payroll PeopleSoft implementation.

**The Carolina HR Council, and a New Approach to HR Communications**

HR Directors/Managers will be the central touchpoint for OHR in their units. This group will be brought together to make up the new Carolina HR Council (which replaces HRAAC). In the Council, every unit will have a representative at the table, meeting monthly to share and receive information.

Going forward, OHR will focus communications on this group and a deputy in each unit. The HR leads will be charged to forward information as needed within their school or division. Because the group is so much smaller, OHR will be able to communicate more intensively, strengthening the connection between OHR and the HR leads. And a strengthened connection between OHR and the HR leads will facilitate consistency in approach, quality and expectations across campus.
Q & A

Q When do these changes go into effect?
These changes must be in place no later than the PeopleSoft HR/Payroll system go-live, which is planned for January 2014. We expect that the changes will be phased in to allow sufficient time for a well-planned and coordinated transition. Schools and divisions may choose to roll out these changes as early as their individual situations may allow. Until such time that unit plans are finalized and firm effective dates for the transition are communicated, schools and divisions will maintain their current processes for providing HR service delivery.

Q Does this change mean people will lose their jobs?
The goal of limiting access to complex actions is to enhance service, not reduce staff. For most people who will no longer perform complex actions, these actions make up a small part of their workload. There may be additional positions added in larger school/division dean’s offices, so there could be new opportunities as well.

Q Does senior administration support this concept?
Senior University administration, including the Chancellor, Provost and the HR/Payroll Stakeholder Committee, concur with this plan. OHR has been and will continue to engage with deans and vice chancellors, especially those for whom this is a significant change, to help with the transition.

Q Who’s making the decisions about how this will work in my school?
The HR leads in each school and division, in collaboration with their Dean and Vice Chancellor, will create the implementation plans for each unit based on the allocation of full access licenses provided by OHR.

Q Is this centralizing HR?
Not at all. HR functions will still be decentralized, but in a less broadly distributed way that provides service, responsibility and accountability at the school and division level.

Q I’m currently an HR Facilitator for my department. What does this mean for me, specifically?
In most cases, your school or division HR office will have the best answer to that question, since they are preparing the implementation plans. Many HR Facilitators have other duties in addition to their HR roles, so it’s anticipated that the time spent on HR can be reallocated to other responsibilities in the department. This is not designed as a means to reduce the number of employees, but rather to improve service and accountability.

Q My faculty members depend on me for immediate information. They won’t get that from the Dean’s Office. Won’t this change be confusing for faculty and other employees?
We believe this will provide more consistent communication, which can be tailored for each school and division. However, this will be a change for people at all levels on campus, and change can be difficult to accept. If you have concerns about how this change will be accepted in your department, we encourage you to talk with the HR lead in your school or division about the best ways to manage the change.

Q How will general HR communications be distributed going forward?
OHR will distribute information to the HR Director/Manager and a designated backup. Each HR Director/Manager will determine the best way to distribute information to the school or division. HR news will continue to be posted publicly on the OHR website.
Q Is there a limit on the number of basic action licenses?
No, schools or divisions can have as many as needed, and they can be located at any level of the unit.

Q Is there flexibility to take special situations into account?
Yes. The number of licenses is firm, but the school or division has control over how licenses are assigned.

Q What about training?
All new roles will have training requirements. System training will be provided both before and after PeopleSoft is up and running. Required HR policy and procedure training will be provided at least annually.

Q Will training classes be offered frequently?
Absolutely. Plenty of classes will be scheduled. Depending on the topic, online learning opportunities may also be offered.

Q Who will be able to originate postdoc actions?
Postdoc actions are considered complex actions, so anyone with access to originate complex actions can originate postdoc actions.

Q Is OHR going to tell our school or division how the HR function in the Dean’s office should be set up?
No. Each school or division will determine how this structure will be implemented in their organization, working closely with the Office of Human Resources – particularly the Classification and Compensation unit. OHR will also provide the number of full accesses allocated for the school or division.

Q Will the HR representatives in the school or division report to OHR or to the school/division administration?
Campus HR representatives will not report to OHR. However, the HR Director/Manager will be accountable to OHR for all HR activities in the unit.

Q I’m currently an HR Facilitator. When will I find out what this means for my job?
Schools and divisions have recently been asked to develop preliminary implementation plans, due in the first quarter of 2013. Please understand that this is a work in progress – which has just begun – and all of the details about how this new service delivery model will be implemented in your unit may take some time to be worked out and communicated. We ask for your patience as that process gets under way.

Q Will there be enough full access allocations to allow backups?
Yes. We have ensured that there are sufficient allocations to allow at least one backup in every school or division. Plus, the HR lead in each unit will have full access, but is not included in the allocation count.

Q What will this mean for the ongoing implementation of PeopleAdmin?
This change will not affect PeopleAdmin access at the current time. We will assess the needs for that system separately in the future.

Q Will the campus HR roles all have HR classifications?
Each school and division will work with OHR Classification and Compensation on the appropriate classifications for their positions. However, using HR classifications where possible will help the University move to a more knowledgeable and experienced HR organization, both in OHR and on campus.