HR/P Integrated Service Center (ISC) – Staffing Review

January, 2017
Summary of Operating Model
As Discussed in Meeting on 12/21

The objective of the ISC is to provide a consistent level of service and enable functional and technical change management of processes and technology:

<table>
<thead>
<tr>
<th>Area</th>
<th>Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Internal to the ISC</strong></td>
<td></td>
</tr>
<tr>
<td>Tier 1</td>
<td>Tier 1 supports high volume employee and manager inquiries related to HR, Benefits and Time/Absence Pay. UWConnect will be used to track all cases. Escalations will be routed to Tier 2 or CBUs are required</td>
</tr>
<tr>
<td>Tier 2</td>
<td>Tier 2 will provide department/unit administrators with end-to-end guidance of HR/Payroll operations, assist in the maintenance of the knowledge base, process payroll, assist in training material development, implement process improvement as well as review/approve and execute transactions within Workday. Complex inquiries will also be routed to Tier 2 for resolution</td>
</tr>
<tr>
<td>Tier 3</td>
<td>Tier 3 will provide application support for ISC applications, training for ISC and campus/Medical Centers, and project management support for Workday updates, process improvement opportunities and the management of quality standards</td>
</tr>
<tr>
<td><strong>External to the ISC</strong></td>
<td></td>
</tr>
<tr>
<td>CBUs</td>
<td>CBUs will continue to own all strategic activities, policy management, vendor relationships and support requiring advanced expertise and analysis. CBUs will also continue to maintain ownership in specific HR functional areas that are deemed ‘high touch’ (i.e. labor relations, recruitment, retirement planning, etc.)</td>
</tr>
</tbody>
</table>
Staffing Projections for the ISC

A number of approaches were used to determine the total staff required to perform the various functions of the ISC:

- Current state HR/P volume records were analyzed to project effort required to resolve inquiries from employees, managers and administrators
- FY15 HR/P transactions were analyzed to project effort required to support WD transactions processed by the Tier 2 HCM Service Partners and Benefits Specialists in the ISC
- Peer Institutions who have implemented Workday and a Service Center (i.e. CMU, Yale, NYU) and best practice benchmarks were incorporated into the projections
- Position Descriptions for HR/P related staff were reviewed to project effort required to perform functions within the ISC

ISC Staffing Estimate
61.5 FTE’s
ISC Organizational Structure
Employee/Manager Customer Support & Operations

• The ISC is structured in a tiered support model broken out into employee/manager customer support, Human Capital Management (HCM), Benefits and Payroll operations and application/services support:
  • The employee/manager customer support and operations function (Tiers 1 & 2) totals 44.5 FTE’s and is responsible for resolving HR/Payroll customer inquiries, working with departments to review & process Workday HCM transactions, determining benefits eligibility and processing payroll:
    • Customer support and operations constitutes 72% of ISC staffing
  • Best practice benchmarks indicate that there should be 1 ISC customer support/operations FTE for every 1,000 customers served
  • The current staffing model for the ISC has a ratio of 1 customer support/operations customer support FTE for every 1,051 UW customers*
  • The ISC is currently slightly above the recommended staffing ratio

*46,779 customers based on November 2017 payroll data
ISC Organizational Structure
Application and Service Support

• The Application and Service Support team (Tier 3) totals 17 FTE’s and is responsible for maintenance and continuous improvement of Workday functional configuration (application support) and leading cohesive operations across the ISC service delivery model, including release management, knowledge management, training and communications (service support)
  • Application and services support represents 28% of the ISC staffing
  • Staffing estimates for Tier 3 are based on other universities that have implemented Workday
## Tier 1

### Customer Support Position Details

<table>
<thead>
<tr>
<th>Role</th>
<th>FTEs</th>
<th>Responsibility Summary</th>
</tr>
</thead>
</table>
| Customer Support Manager                     | 1.0  | • Responsible for managing Tier 1 Customer Support Representatives (10 FTE’s) within the ISC  
• Promotes an outstanding customer-service environment, including strong communication skills and application of tact and diplomacy when dealing with customers  
• Member of management team accountable for the successful operations of the ISC |
| Sr. Customer Support Representative/Customer Support Representative | 10.0 | • Serves as the first point of contact for resolution of HR and Payroll inquiries directed to the ISC by the University’s faculty, staff and student workers  
• Escalates complex issues to Tier 2 specialists within the ISC and Central Business Units as required  
• Assists walk-in customers with onboarding activities and/or other employee support requests  
• Responsible for resolving the majority of inquiries directed to the ISC |
## Tier 2
### HCM, Benefit & Payroll Operations Position Details

<table>
<thead>
<tr>
<th>Role</th>
<th>FTEs</th>
<th>Responsibility Summary</th>
</tr>
</thead>
</table>
| HCM Operations Director    | 1.0   | • Manages and coaches team of Tier 2 HCM Service Partners (11.0 FTE’s) serving as cross-functional transactional generalists for units/departments  
                                • Ensures completion of assigned HCM transactions in accordance with established service delivery standards  
                                • Ensures HCM Service Partners are sufficiently trained to meet established service delivery standards  
                                • Ensures HCM Service Partners develop constructive alignments within designated units/departments  
                                • Member of management team accountable for the successful operations of the ISC  |
| HCM Service Partners        | 11.0  | • Supports the University’s faculty, staff and working students by resolving complex HR and Payroll inquiries and by processing a defined scope of centralized Human Capital Management (HCM) system transactions  
                                • Functions as a resource and partner for unit/department administrators  
                                • Develops extensive insight across HCM processes (both within and external to Workday HCM) and consistently applies this end-to-end perspective in conjunction with meeting the service delivery objectives of the ISC  
                                • Ensures completion and has oversight of critical transactions to promote data integrity |
## Tier 2

**Benefit Operations Position Details**

<table>
<thead>
<tr>
<th>Role</th>
<th>FTEs</th>
<th>Responsibility Summary</th>
</tr>
</thead>
</table>
| ISC Benefits Director        | 1.0  | • Manages and coaches a team of Tier 2 Benefit Specialists (5.0 FTE’s)  
|                              |      | • Possesses extensive insight into benefit transactional processes, including requirements/dependencies within and external to Workday functionality  
|                              |      | • Ensures completion of assigned benefit transactions in accordance with established delivery standards  
|                              |      | • Ensures Benefit Specialists are sufficiently trained to meet established service delivery standards  
|                              |      | • Member of management team accountable for the successful operations of the ISC                                                                                                                                                                                                               |
| Benefits Specialist          | 5.0  | • Supports the University’s faculty, staff and working students by resolving complex benefits transactions and inquiries  
|                              |      | • Reviews and approves benefit transactions (i.e. benefits enrollment, life events, dependent events/verifications)  
|                              |      | • Executes benefit transactions (i.e. Non-automated eligibility determinations – Health & Welfare and Retirement, communication of enrollment windows and deadlines, facilitation of Annual and Special Open Enrollments)                                                                                                         |
# Tier 2
## Payroll Operations Position Details

<table>
<thead>
<tr>
<th>Role</th>
<th>FTEs</th>
<th>Responsibility Summary</th>
</tr>
</thead>
</table>
| Sr. Payroll Operations Director | 1.0  | • Manages and coaches a team of Tier 2 Payroll Specialists and Analysts (12.5 FTE’s)  
• Possesses extensive insight into Payroll transactional processes, including requirements/dependencies within and external to Workday functionality  
• Ensures completion of payroll transactions in accordance with established service delivery standards  
• Ensures Payroll team is sufficiently trained to meet established service delivery standards  
• Member of management team accountable for the successful operations of the ISC |
| Payroll Manager           | 2.0  | • Manages and coaches a team of Tier 2 Payroll Specialists and/or Analysts  
• Possesses extensive insight into Payroll transactional processes, including requirements/dependencies within and external to Workday functionality  
• Ensures completion of payroll transactions in accordance with established standards  
• Coordinates with CBU owners to drive alignment on policy, procedures and execution of transactions  
• Cultivates a high-caliber service environment by ensuring the timeliness and accuracy of customer responses  
• Ensures Payroll Specialists and Analysts are sufficiently trained to meet established service standards  
• Adapts efficiently to changing policy, process and system requirements in support of a continuous improvement model  
• Identifies and promotes process improvement opportunities |
## Tier 2

**Payroll Operations Position Details (Cont.)**

<table>
<thead>
<tr>
<th>Role</th>
<th>FTEs</th>
<th>Responsibility Summary</th>
</tr>
</thead>
</table>
| Payroll Financial & Reporting Analyst | 1.0  | • Leads the development and analysis of payroll financial data and reporting metrics  
• Coordinates with ISC leadership and stakeholders to interpret payroll financial data, identify issues and implement resolution plans  
• Supports successful execution of payroll processes as required, including tax filings and related reporting  
• Supports timely resolution of complex payroll issues/inquiries                                                                                                                                 |
| Payroll Specialist/Analyst    | 9.5  | • Main point of contact within ISC Payroll for resolution of complex issues/inquiries  
• Acts as main point of contact within ISC Payroll Operations for specific external payroll units as required  
• Supports successful execution of payroll processes as required, examples include:  
  • Payroll Inputs (including voluntary deductions)  
  • Time Entry/Corrections  
  • Overpayment Recovery (including reporting and coordination with outside collection agencies as required)  
  • Retro Payments  
  • Payment Adjustments  
  • Final Payments  
  • Withholding Orders (i.e., involuntary wage assignments – IRS Levies, Child Support, Loans, etc.)  
• Ensures completion of assigned payroll transactions in accordance with established standards |
## Tier 3

### Application Management Position Details

<table>
<thead>
<tr>
<th>Role</th>
<th>FTEs</th>
<th>Responsibility Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application Management Director</td>
<td>1.0</td>
<td>• Leads maintenance, testing, upgrades and continuous improvement of the Workday functional configuration&lt;br&gt;• Manages and coaches the application support team (10.0 FTE's)&lt;br&gt;• Foster an environment focused on customer service and a high level of collaboration and coordination across the ISC and with stakeholders, including designated alignments and federated partners&lt;br&gt;• Member of management team accountable for the successful operations of the ISC</td>
</tr>
<tr>
<td>Application Managers (HCM, Payroll, Security, Benefits, Reporting)</td>
<td>5.0</td>
<td>• For respective Workday domain areas:&lt;br&gt;  - Lead ongoing foundational and business process configuration activities, including defect resolutions, identified improvement opportunities and scheduled Workday releases&lt;br&gt;  - Implement team training strategies, including required backup and cross-training provisions&lt;br&gt;  - Serve as the primary content expert for the development of Workday training material, reporting and integrations&lt;br&gt;  - Coordinate testing/validation of functionality changes</td>
</tr>
<tr>
<td>Sr. Application Analyst (HCM, Acad, Talent/Perf, HCM/Compensation, Payroll, Time &amp; Absence, Reporting)</td>
<td>5.0</td>
<td>• Execute ongoing foundational and business process configuration activities, including defect resolutions, identified improvement opportunities and scheduled Workday releases&lt;br&gt;• Support team training strategies, including cultivation of required backup and cross-domain expertise&lt;br&gt;• Coordinate with other ISC team members to troubleshoot and resolve escalated issues/inquiries&lt;br&gt;• Support development of Workday domain area training material&lt;br&gt;• Participate in testing/validation of functionality changes&lt;br&gt;• Act as the primary functional owner for designated integrations and coordinate with technical teams accordingly</td>
</tr>
</tbody>
</table>
## Tier 3

### Services Support Position Details

<table>
<thead>
<tr>
<th>Role</th>
<th>FTEs</th>
<th>Responsibility Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sr. Services Support Manager</td>
<td>1.0</td>
<td>• Leads cohesive operations across the ISC service delivery model, including release management, knowledge management and training and communications</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Manages and coaches the Services Support team (5.0 FTE’s)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Fosters an environment focused on customer service and a high level of collaboration and coordination across the ISC and with stakeholders</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Member of management team accountable for the successful operations of the ISC</td>
</tr>
<tr>
<td>Knowledge Management Specialist</td>
<td>1.0</td>
<td>• Lead ISC knowledge management processes, including creation/modification of knowledge management content and associated coordination with stakeholders</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Monitor and evaluate an extensive repository of HR/P inquiry responses and issue resolutions, maintaining the associated content over time to reflect enhanced understanding and the evolving needs of the organization</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Manage the ISC website, ensuring high quality user experiences and incorporating functional updates to site content/communications to meet changing needs</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Maintain functional documentation (User Guides, FSPDs, Knowledge Articles, training materials) to ensure design and end user information is accurate and consistent</td>
</tr>
<tr>
<td>Project Manager</td>
<td>1.0</td>
<td>• Manage cyclical Workday releases, including planning, cross-team coordination, objective setting, testing and migration into the Production tenant</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Monitor and evaluate the Workday roadmap, keeping stakeholders informed of scheduled updates and framing associated decision points</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Manage Workday change request and change control processes, including identification of improvement opportunities, coordination of associated configuration and testing, and migration into the Production tenant</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Provide project management support for all major scheduled and ad-hoc Workday functionality roll-outs/activities (e.g., Open Enrollment, Annual Merit processes, mass updates, etc.), including planning and coordination of change management and communications</td>
</tr>
</tbody>
</table>
## Tier 3

**Services Support Position Details (Cont.)**

<table>
<thead>
<tr>
<th>Role</th>
<th>FTEs</th>
<th>Responsibility Summary</th>
</tr>
</thead>
</table>
| Business Analyst      | 1.0  | • Provide analytical support for all Workday releases and process changes, including re-mapping business processes, identifying required changes in training materials and contributing to associated stakeholder communications  
• Support monitoring and evaluation of the Workday roadmap  
• Support management of Workday change request and change control processes, including analysis and documentation  
• Coordinate with other ISC team members and stakeholders to promote consistent continuous improvement processes, including ongoing analysis of metrics, process feedback and prospective improvement opportunities |
| Training & Communications Manager | 1.0  | • Lead development and execution of ISC training activities, including frameworks for training internal team members and external Workday users/stakeholders  
• Identify and drive cross-training activities across the ISC, coordinating with team leadership to ensure that training promotes end-to-end insight across domain areas and drives continuity through resource backup planning  
• Lead ISC change management and communications efforts, including support of major roll-outs and periodic updates |
| Training & Communications Specialist | 1.0  | • Support development and execution of ISC training activities, including frameworks for training internal team members and external Workday users/stakeholders  
• Support ISC change management and communications efforts, including support of major roll-outs and periodic updates |
Appendix
Model Attributes

The model projects required effort levels based on the following inputs:

- Resolution Rate
- % of call routed within the ISC
- % of calls routed outside of the ISC
- % of calls deemed to be spam
- % of time spent addressing inquiries
- Time to resolve a case
- Time to escalate a case

Overview

Current state HR/P volume records were analyzed to project effort required to resolve inquiries from employees, managers and administrators.

The model uses estimates for resolution rates and time spent to project effort levels attributable to Tier 1 Service Desk staff, tier 2 staff (including Payroll, Benefits and HCM Service Partner sub-groups), and a component of Tier 3 application support.

The resulting analysis is exclusive of effort related to additional time spent on special projects, training, etc. Those estimates are incorporated in separate models and estimates that will be combined to arrive at the total level of effort needed the ISC.
ISC FTE Estimation Methodology

Transaction Analysis

Overview

FY15 HR/P transactions were analyzed to project effort required to support WD transaction processing by the Tier 2 HCM Service Partners and Benefits Specialists in the ISC.

UW transaction types were converted into Workday equivalents and assigned a ‘level of effort’ to approximate processing time.

The resulting analysis is exclusive of effort related to call/email inquiries and additional time spent on special projects, training, etc. Those estimates are incorporated in separate models and estimates that will be combined to arrive at the total level of effort needed for tier 2 of the ISC.

Model Attributes

The model projects required effort levels based on the following inputs:
- Transaction volume for over 40 transaction types
- % of transactions handled by the ISC
- % of complex transactions
- % of simple transactions
- Time to complete transactions

<table>
<thead>
<tr>
<th>Transaction type</th>
<th>High Level Bucket</th>
<th>Volume per year</th>
<th>% of Transaction handled by ISC</th>
<th>% of Transaction Complex</th>
<th>Minutes to Complete Complex Transaction</th>
<th>Minutes to Complete Simple Transaction</th>
<th>Total Completion Time (min)</th>
<th>ISC Dedicated Time per Week (min)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reversion</td>
<td>Reversion</td>
<td>2</td>
<td>0%</td>
<td>0%</td>
<td>100%</td>
<td>5</td>
<td>5.00</td>
<td>0</td>
</tr>
<tr>
<td>Appointment Change</td>
<td>Managing Changes-WFA</td>
<td>8434</td>
<td>100%</td>
<td>25%</td>
<td>75%</td>
<td>15</td>
<td>10.25</td>
<td>7695</td>
</tr>
<tr>
<td>New Appointment</td>
<td>Managing Changes-WFA</td>
<td>22410</td>
<td>100%</td>
<td>25%</td>
<td>75%</td>
<td>10</td>
<td>6.25</td>
<td>2791</td>
</tr>
<tr>
<td>Data Correction</td>
<td>Managing Changes-WFA</td>
<td>8831</td>
<td>100%</td>
<td>25%</td>
<td>75%</td>
<td>10</td>
<td>6.25</td>
<td>1100</td>
</tr>
<tr>
<td>Hourly Rate Change</td>
<td>Managing Changes-WFA</td>
<td>4588</td>
<td>100%</td>
<td>25%</td>
<td>75%</td>
<td>10</td>
<td>6.25</td>
<td>571</td>
</tr>
<tr>
<td>Change To Percent Of Full-Time</td>
<td>Managing Changes-WFA</td>
<td>9000</td>
<td>100%</td>
<td>25%</td>
<td>75%</td>
<td>20</td>
<td>12.50</td>
<td>749</td>
</tr>
<tr>
<td>Change To Home Department</td>
<td>Managing Changes-WFA</td>
<td>1305</td>
<td>100%</td>
<td>25%</td>
<td>75%</td>
<td>20</td>
<td>12.50</td>
<td>325</td>
</tr>
<tr>
<td>Promotion</td>
<td>Managing Changes-WFA</td>
<td>1170</td>
<td>100%</td>
<td>25%</td>
<td>75%</td>
<td>15</td>
<td>7.50</td>
<td>175</td>
</tr>
</tbody>
</table>
Overview

Current Position Descriptions for select HR/P related staff were reviewed to project effort required to perform select functions within the ISC.

The review leveraged the expected roles and responsibilities outlined for the ISC in the initial design document to determine which effort attributable to various groups within the ISC, as well as in the CBUs.

In addition to estimating required effort levels, the PD review was used to estimate the corresponding budget impact on CBU’s.

Model Attributes

The position descriptions and organization charts were reviewed for the following information:

- % Effort projected to move to the ISC vs. remain in the CBU
- Job classifications and grades
- Reporting relationships

<table>
<thead>
<tr>
<th>Org</th>
<th>Dept</th>
<th>Position</th>
<th>Grade</th>
<th>Hourly FTE</th>
<th>T1</th>
<th>T2-Gem</th>
<th>T2-Ben</th>
<th>T2-PY</th>
<th>T3-App</th>
<th>T3-PM</th>
<th>T3-PM</th>
<th>CBUL-Chk</th>
<th>CBUL-Ben</th>
<th>CBUL-Finance</th>
<th>CBUL-AP</th>
<th>CBUL-Comp</th>
<th>Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Payroll</td>
<td>Associate Controller</td>
<td>PS12</td>
<td>1.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>1.00</td>
</tr>
<tr>
<td>3</td>
<td>Payroll</td>
<td>Operations Analyst</td>
<td>PS09-165</td>
<td>1.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Payroll</td>
<td>Tax &amp; Accounting Senior</td>
<td>84-481</td>
<td>3.00</td>
<td>3.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Payroll</td>
<td>Accountant II</td>
<td>84-R045</td>
<td>1.00</td>
<td>1.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Payroll</td>
<td>Tax &amp; Accounting Manager</td>
<td>PS09-116</td>
<td>1.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Payroll</td>
<td>Production Manager</td>
<td>PS07-261</td>
<td>1.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Payroll</td>
<td>Production Specialist II</td>
<td>84-R044</td>
<td>4.50</td>
<td>4.50</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Payroll</td>
<td>Production Accountant II</td>
<td>84-R045</td>
<td>2.00</td>
<td>2.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Payroll</td>
<td>Client Services</td>
<td>Program Ops Specialist</td>
<td>1.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## ISC FTE Estimation Methodology

The applicability of the various approaches to measuring the staffing levels required in the ISC is summarized in the table below.

<table>
<thead>
<tr>
<th>ISC Group</th>
<th>Transaction Analysis$^1$</th>
<th>Inquiry/Call Volume Analysis$^2$</th>
<th>Position Description Review$^3$</th>
<th>Original Operating Model Review$^4$</th>
<th>WD Institution Comparison$^5$</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tier 1 Service Desk</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tier 2 – HCM Generalists</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Tier 2 - Payroll</td>
<td></td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tier 2 - Benefits</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tier 3 – Application Support</td>
<td></td>
<td></td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Tier 3 - HRP ISC Support</td>
<td></td>
<td></td>
<td></td>
<td>✓</td>
<td></td>
</tr>
</tbody>
</table>

1 Source: 37 HCM transactional and ~10 Benefits transactional data provided in Data Request, validated by Business Owners
2 Source: Help desk call data and trends provided in the Discovery Summary and Customer Readiness documents
3 Source: Organizational Charts and Position Descriptions provided by the Business Owners
4 Source: Original Operating Model Budget and Executive Sponsor documentation
5 Source: Peer Institutions who have implemented Workday and a Service Center (i.e CMU, Yale, NYU)
ISC Staffing Estimates
Tier 1 – Customer Support

Staffing Estimates for Tier 1 were developed using existing HR/P call volume metrics and a review of current staff PDs. A summary of the analysis is provided below.

**Model FTE Estimate:** 10 to 15

**Customer Alignment:** Tier 1 staff will be cross-trained on HR/P functional

**Anticipated Job Titles:** Customer Support Specialist, Customer Support Manager

**Reporting Relationship:** Tier 1 staff will report to a lead within Tier 1

**Key Assumptions**
- Assumed an increase of 15% of inquiries due to Workday
- 85% first call resolution
- Each inquiry requires 10 minutes to resolve or escalate
- T-1 support specialists dedicate 80% of their time to addressing calls and other inquiries
Staffing estimates for Tier 2 are based on transaction volume analysis and a review of position descriptions.

**Tier 2 – Staffing Estimate (FTE)**

- **HCM Operations**: 11 FTEs
- **Benefits**: 6 FTEs
- **Payroll**: 13 - 14 FTEs

**Payroll**
- **FTE Estimate**: 13 - 14
- **Customer Alignment**: None
- **Job Titles**: Payroll Manager, Payroll Specialist, Payroll Analyst, Payroll Sr Analyst
- **Reporting**: Team will report to Sr Director of Payroll Operations

**HCM Operations**
- **FTE Estimate Range**: to 10-15
- **Customer Alignment**: Assigned to select departments/units
- **Job Titles**: HCM Service Partner
- **Reporting**: HCM Service Partners will report to HCM Operations Sr Manager

**Benefits**
- **FTE Estimate**: 6
- **Customer Alignment**: None
- **Job Titles**: Benefits Specialist
- **Reporting**: Benefits Specialists will report to Benefits Manager
Staffing estimates for Tier 2 – HCM Operations are based on transaction volume analysis and a review of position descriptions.

**Staffing Estimates**

- The chart at the right displays how the 10-12 HCM Service Partners are expected to spend their time based on transaction and inquiry analyses.
- HCM Service Partners will support transactions, inquiry resolution, and special projects as needed:
  - Analysis of current transactions, translated into relevant Workday categories, projects that 8-10 FTE will be needed to support WD transactions.
  - Analysis of inquiries projects an additional 2-3 FTE will need to support inquiry volume and other projects as needed.

**HCM Service Partner**

*Key Activities*

- Other Activities
- Escalated Inquiries
- Managing Separations
- Data Corrections
- Compensation
- Managing Changes - WFA

*Effort*

- 0%
- 10%
- 20%
- 30%
- 40%
- 50%
- 60%
- 70%
- 80%
- 90%
- 100%
ISC Staffing Estimates
Tier 2 – Benefits

Staffing estimates for Tier 2 – Benefits are based on transactional analysis, call volume analysis, peer institution benchmarking, and position description review.

Staffing Estimates
• The chart at the right displays how the 6-8 Benefits Specialists are expected to spend their time based on transaction and inquiry analyses
• Benefits Specialists will support transactions, inquiry resolution, and special projects as needed
  • Analysis of current transactions projects that 5-6 FTE will be needed to support forms and eligibility processing
  • Analysis of inquiries projects an additional 1-2 FTE will need to support Tier 2 inquiry volume and other projects as needed
• These estimates exclude work currently completed by Fiscal Specialists in the Benefits office

Benefits Specialists Key Activities
- Escalated Inquiries
- Eligibility Review
- Open Enrollment
- Disability Forms
- Retirement Forms
- Medical/Dental

From June Staffing Support Document
ISC Staffing Estimates
Tier 2 – Payroll

Staffing estimates for Tier 2 – Payroll are based on peer institution benchmarking and position description review.

**Staffing Estimates**

- Payroll will support payroll production, operations and escalated inquiries.
- Payroll teams will be organized similarly to today
  - Analysis projects that 8.5-9.5 FTE will be needed to support Key Payroll Activities
  - Analysis of inquiries projects an additional 2-3 FTE will need to support inquiry volume and other projects as needed

**Payroll Office Peer Comparison**

*Excludes PY FTE dedicated to international campuses or other unique operations.
Staffing estimates for Tier 3 are based on a review of other universities who have implemented Workday, modified for the UW population.

**Tier 3 – Workday Support**

- **T-3 Application Support**
  - FTE Estimate: 10
  - Customer Alignment: None
  - Reporting: Team will report to Application Support Manager

- **T-3 HRP ISC Support**
  - FTE Estimate: 6
  - Customer Alignment: None
  - Job Titles: Training and Comms Manager, Training and Comms Specialist, Knowledge Management Specialist, ISC Project Manager, ISC Business Analyst
  - Reporting: Team will report to ISC Operations Manager
Tier 1
Position Details

Job Title(s): Customer Support Manager
Proposed FTE’s: 1.0

Primary Responsibilities:
• Responsible for managing Tier 1 Customer Support Representatives (10 FTE’s) within the ISC
• Promotes an outstanding customer-service environment, including strong communication skills and application of tact and diplomacy when dealing with customers
• Member of management team accountable for the successful operations of the ISC

Risks to Reducing FTE:
• Tier 1 Customer Support function will be left with a void in leadership (CSR positions are projected to be classified staff)
• Accountability, morale and performance of Tier 1 Customer Support Representatives will suffer due to limited oversight
• Lack of a dedicated escalation point for issues impacting the Tier 1 function
• Void in identifying and implementing internal process improvement opportunities for Tier 1
• Decreased responsiveness to trends/metrics involving end user inquiries and issues
Tier 1
Position Details

Job Title(s): Sr. Customer Support Representative, Customer Support Representative
Proposed FTE’s: 10.0

Primary Responsibilities:
• Serves as the first point of contact for resolution of HR and Payroll inquiries directed to the ISC by the University’s faculty, staff and student workers
• Escalates complex issues to Tier 2 specialists within the ISC and Central Business Units as required
• Assists walk-in customers with onboarding activities and/or other employee support requests
• Responsible for resolving the majority of inquires directed to the ISC

Risks to Reducing FTE’s:
• Level of customer service available to faculty, staff and student workers will be inadequate, leading to frustrated customers and a poor overall perception of the implemented solution (e.g., increased customer wait times, longer time to resolution, etc.)
• Customer inquiries will need to be resolved in departments/units or routed to CBU’s for resolution – Lack of continuity and end-to-end insight will lead to inaccurate and/or inconsistent resolutions
• Tier 1 is expected to resolve a significant percentage of customer inquiries (i.e., it is not designed to be a “pass through” function) – Diminishing the front-line will result in more escalations to Tier 2 and adversely impact other ISC operational responsibilities
• Restructuring this classified function will require additional discussions with the bargaining units and result in delays (i.e., 6 months at $2 million per month for a total of $12 million)
Tier 2
Position Details

Job Title(s): HCM Operations Director
Proposed FTE’s: 1.0

Primary Responsibilities:
• Manages and coaches team of Tier 2 HCM Service Partners (11.0 FTE’s) serving as cross-functional transactional generalists for units/departments
• Ensures completion of assigned HCM transactions in accordance with established service delivery standards
• Ensures HCM Service Partners are sufficiently trained to meet established service delivery standards
• Ensures HCM Service Partners develop constructive alignments within designated units/departments
• Member of management team accountable for the successful operations of the ISC

Risks to Reducing FTE:
• Tier 2 HCM Service Partners will have a void in leadership
• Escalation of Tier 2 HCM inquiries will need to be routed to CBU’s for resolution
• Void in identifying and implementing internal process improvement opportunities for Tier 2
• Prevents coordination with CBU owners and departments/units to drive alignment on policy, procedures and execution of transactions
Tier 2
Position Details

Job Title(s): HCM Service Partners
Proposed FTE’s: 11.0

Primary Responsibilities:
• Supports the University’s faculty, staff and working students by resolving complex HR and Payroll inquiries and by processing a defined scope of centralized Human Capital Management (HCM) system transactions
• Functions as a resource and partner for unit/department administrators
• Develops extensive insight across HCM processes (both within and external to Workday HCM) and consistently applies this end-to-end perspective in conjunction with meeting the service delivery objectives of the ISC
• Ensures completion and has oversight of assigned transactions to the ISC

Risks to Reducing FTE’s:
• Absence of this role means that the service delivery model will lack data integrity oversight/control, end-to-end cognizance of business processes and no dedicated coordination point with over 500 unit administrators in the units – This will result in inconsistent transactional outcomes and potentially significant lapses in data quality
• Elimination of this function will necessitate Workday redesign/reconfiguration of WD business processes, resulting in project delays
• Level of customer service available to unit administrators and CBU’s will decrease, promoting a perception that the delivered solution (i.e., University investment) is ineffective
Tier 2

Position Details

Job Title(s): ISC Benefits Director
Proposed FTE’s: 1.0

Primary Responsibilities:
• Manages and coaches a team of Tier 2 Benefit Specialists (5.0 FTE’s)
• Possesses extensive insight into benefit transactional processes, including requirements/dependencies within and external to Workday functionality
• Ensures completion of assigned benefit transactions in accordance with established delivery standards
• Ensures Benefit Specialists are sufficiently trained to meet established service delivery standards
• Member of management team accountable for the successful operations of the ISC

Risks to Reducing FTE:
• Will leave Tier 2 Benefits Specialist with a vacuum of leadership and benefits compliance oversight
• Void in identifying and implementing internal benefits process improvement opportunities
• Omits coordination point with CBU owners to drive alignment on policy, procedures and execution of transactions
• Omits coordination point with ISC Tier 3 on translation of requirements into benefit configuration changes/enhancements and advancement of new functionality in Workday
Tier 2
Position Details

Job Title(s): Benefits Specialist
Proposed FTE’s: 5.0

Primary Responsibilities:
• Supports the University’s faculty, staff and working students by resolving complex benefits transactions and inquiries
• Reviews and approves benefit transactions (i.e. benefits enrollment, life events, dependent events/verifications)
• Executes benefit transactions (i.e. Non-automated eligibility determinations – Health & Welfare and Retirement, communication of enrollment windows and deadlines, facilitation of Annual and Special Open Enrollments

Risks to Reducing FTE’s:
• Compliance and tracking of benefits eligibility notifications and enrollment windows will be adversely impacted
• Lack of adequate resourcing in this role will reduce capacity to ensure the integrity of numerous manual processes resulting from benefit requirements that cannot be automated
Tier 2
Position Details

Job Title(s): Sr. Payroll Operations Director
Proposed FTE’s: 1.0

Primary Responsibilities:
• Manages and coaches a team of Tier 2 Payroll Specialists and Analysts (12.5 FTE’s)
• Possesses extensive insight into Payroll transactional processes, including requirements/dependencies within and external to Workday functionality
• Ensures completion of payroll transactions in accordance with established service delivery standards
• Ensures Payroll team is sufficiently trained to meet established service delivery standards
• Member of management team accountable for the successful operations of the ISC

Risks to Reducing FTE:
• Will leave Tier 2 ISC Payroll team with a vacuum of leadership and payroll compliance oversight
• Void in identifying and implementing internal payroll process improvement opportunities
• Omits coordination point with CBU owners and campus stakeholders to drive alignment on policy, procedures and execution of transactions
• Omits coordination point with ISC Tier 3 on translation of requirements into payroll configuration changes/enhancements and advancement of new functionality in Workday
Tier 2
Position Details

Job Title(s): Payroll Manager
Proposed FTE’s: 2.0

Primary Responsibilities:
• Manages and coaches a team of Tier 2 Payroll Specialists and/or Analysts
• Possesses extensive insight into Payroll transactional processes, including requirements/dependencies within and external to Workday functionality
• Ensures completion of payroll transactions in accordance with established standards
• Coordinates with CBU owners to drive alignment on policy, procedures and execution of transactions
• Cultivates a high-caliber service environment by ensuring the timeliness and accuracy of customer responses
• Ensures Payroll Specialists and Analysts are sufficiently trained to meet established service standards
• Adapts efficiently to changing policy, process and system requirements in support of a continuous improvement model
• Identifies and promotes process improvement opportunities

Risks to Reducing FTE:
• Will reduce the capacity to effectively manage payroll processing and payroll accounting functions
• Payroll processes will be executed with minimal quality assurance leading to corrections and pay adjustments
Tier 2
Position Details

Job Title(s): Payroll Financial & Reporting Analyst
Proposed FTE’s: 1.0

Primary Responsibilities:
• Leads the development and analysis of payroll financial data and reporting metrics
• Coordinates with ISC leadership and stakeholders to interpret payroll financial data, identify issues and implement resolution plans
• Supports successful execution of payroll processes as required, including tax filings and related reporting
• Supports timely resolution of complex payroll issues/inquiries

Risks to Reducing FTE:
• Will limit reporting capabilities and tracking of financial metrics
• Interpretation and analysis of payroll financial data will need to be absorbed and routed to an alternative position
Job Title(s): Payroll Specialist/Analyst
Proposed FTE’s: 9.5

Primary Responsibilities:
• Main point of contact within ISC Payroll for resolution of complex issues/inquiries
• Acts as main point of contact within ISC Payroll Operations for specific external payroll units as required
• Supports successful execution of payroll processes as required, examples include:
  • Payroll Inputs (including voluntary deductions)
  • Time Entry/Corrections
  • Overpayment Recovery (including reporting and coordination with outside collection agencies as required)
  • Retro Payments
  • Payment Adjustments
  • Final Payments
  • Withholding Orders (i.e., involuntary wage assignments – IRS Levies, Child Support, Loans, etc.)
• Ensures completion of assigned payroll transactions in accordance with established standards

Risks to Reducing FTE:
• Resolution of complex payroll issues/inquiries will need to be absorbed and routed to an alternative position
• External payroll coordinators will have minimal support
• Minimal quality assurance available for execution of payroll processes, leading to corrections and pay adjustments
Tier 3
Position Details

Job Title(s): Application Management Director
Proposed FTE’s: 1.0

Primary Responsibilities:
• Leads maintenance, testing, upgrades and continuous improvement of the Workday functional configuration
• Manages and coaches the application support team (10.0 FTE’s)
• Foster an environment focused on customer service and a high level of collaboration and coordination across the ISC and with stakeholders, including designated alignments and federated partners
• Member of management team accountable for the successful operations of the ISC

Risks to Reducing FTE:
• Will lead to a vacuum in leadership for the Application Management team
• Strategic planning and communication for WD roadmap will need to be transferred and absorbed by another CBU
• Management of maintenance, defects, testing and upgrades will need to be transferred and absorbed by another CBU
• Void in identifying and implementing internal process improvement opportunities
• Configuration and functional changes will be at risk for successful implementation
Tier 3
Position Details

Job Title(s): Application Managers (HCM, Payroll, Security, Benefits, Reporting)
Proposed FTE’s: 5.0

Primary Responsibilities:
• For respective Workday domain areas:
  • Lead ongoing foundational and business process configuration activities, including defect resolutions, identified improvement opportunities and scheduled Workday releases
  • Implement team training strategies, including required backup and cross-training provisions
  • Serve as the primary content expert for the development of Workday training material, reporting and integrations
  • Coordinate testing/validation of functionality changes

Risks to Reducing FTE:
• Responsibilities for Application Managers will need to be transferred and absorbed by a CBU
• The CBU(s) will need to be trained on Workday applications and have bandwidth to absorb work
• Capacity for implementing process improvement opportunities will be limited
Tier 3
Position Details

Job Title(s): Sr. Application Analyst (HCM, Acad, Talent/Perf, HCM/Compensation, Payroll, Time & Absence, Reporting)
Proposed FTE’s: 5.0

Primary Responsibilities:
• For respective Workday domain areas:
  • Execute ongoing foundational and business process configuration activities, including defect resolutions, identified improvement opportunities and scheduled Workday releases
  • Support team training strategies, including cultivation of required backup and cross-domain expertise
  • Coordinate with other ISC team members to troubleshoot and resolve escalated issues/inquiries
  • Support development of Workday domain area training material
  • Participate in testing/validation of functionality changes
  • Act as the primary functional owner for designated integrations and coordinate with technical teams accordingly

Risks to Reducing FTE:
• Responsibilities for Application Managers will need to be transferred and absorbed by a CBU
• The CBU(s) will need to be trained on Workday applications and have bandwidth to absorb work
• Scope for implementing process improvement opportunities will be limited
Tier 3
Position Details
Job Title(s): Sr. Services Support Manager
Proposed FTE’s: 1.0

Primary Responsibilities:
• Leads cohesive operations across the ISC service delivery model, including release management, knowledge management and training and communications
• Manages and coaches the Services Support team (5.0 FTE’s)
• Fosters an environment focused on customer service and a high level of collaboration and coordination across the ISC and with stakeholders
• Member of management team accountable for the successful operations of the ISC

Risks to Reducing FTE:
• Omits a role dedicated to ensuring that the University can support the change, planning, training and knowledge management requirements associated with a constantly evolving SaaS solution
• Distributes accountability for implementing Workday updates to areas outside of the ISC (i.e., the CBUs and unit administrators)
• Increases potential for operational disconnects and/or resource prioritization conflicts
Tier 3
Position Details

Job Title(s): Knowledge Management Specialist
Proposed FTE’s: 1.0

Primary Responsibilities:
• Lead ISC knowledge management processes, including creation/modification of knowledge management content and associated coordination with stakeholders
• Monitor and evaluate an extensive repository of HR/P inquiry responses and issue resolutions, maintaining the associated content over time to reflect enhanced understanding and the evolving needs of the organization
• Manage the ISC website, ensuring high quality user experiences and incorporating functional updates to site content/communications to meet changing needs
• Maintain functional documentation (User Guides, FSPDs, Knowledge Articles, training materials) to ensure design and end user information is accurate and consistent

Risks to Reducing FTE:
• Documentation will become inaccurate for customers as changes are made to design and WD releases are implemented
• Inaccurate documentation will cause confusion and frustration for customers
Tier 3
Position Details

Job Title(s): Project Manager
Proposed FTE’s: 1.0

Primary Responsibilities:
• Manage cyclical Workday releases, including planning, cross-team coordination, objective setting, testing and migration into the Production tenant
• Monitor and evaluate the Workday roadmap, keeping stakeholders informed of scheduled updates and framing associated decision points
• Manage Workday change request and change control processes, including identification of improvement opportunities, coordination of associated configuration and testing, and migration into the Production tenant
• Provide project management support for all major scheduled and ad-hoc Workday functionality roll-outs/activities (e.g., Open Enrollment, Annual Merit processes, mass updates, etc.), including planning and coordination of change management and communications

Risks to Reducing FTE:
• ISC will not have operational project management oversite
• Responsibilities for Project Manager will need to be transferred and absorbed by the CBUs to coordinate Application and Support Services activities
Tier 3
Position Details

Job Title(s): Business Analyst
Proposed FTE’s: 1.0

Primary Responsibilities:
• Provide analytical support for all Workday releases and process changes, including re-mapping business processes, identifying required changes in training materials and contributing to associated stakeholder communications
• Support monitoring and evaluation of the Workday roadmap
• Support management of Workday change request and change control processes, including analysis and documentation
• Coordinate with other ISC team members and stakeholders to promote consistent continuous improvement processes, including ongoing analysis of metrics, process feedback and prospective improvement opportunities

Risks to Reducing FTE:
• Reduction in capacity to analyze the impact of Workday releases/enhancements on business processes, including training material updates and stakeholder communications
• Reduction of support for Workday change request/change control processes
Job Title(s): Training and Communications Manager
Proposed FTE’s: 1.0

Primary Responsibilities:
• Lead development and execution of ISC training activities, including frameworks for training internal team members and external Workday users/stakeholders
• Identify and drive cross-training activities across the ISC, coordinating with team leadership to ensure that training promotes end-to-end insight across domain areas and drives continuity through resource backup planning
• Lead ISC change management and communications efforts, including support of major roll-outs and periodic updates

Risks to Reducing FTE:
• The training and communications area will have a void in leadership
• Less informed campus community due to reduced ability to provide timely communications, in-person training/roundtable sessions, and updated training materials
• Diminished initial and ongoing training will result in both campus administrators and ISC staff being inadequately prepared to perform their jobs
• Reduced opportunities for coordination and communication with CBU owners and departments/units to drive alignment on the change request roadmap, policy, procedures and execution of transactions
• Void in identifying and implementing training or process improvement opportunities for both internal team and campus administrators
Tier 3
Position Details

Job Title(s): Training and Communications Specialist
Proposed FTE’s: 1.0

Primary Responsibilities:
• Support development and execution of ISC training activities, including frameworks for training internal team members and external Workday users/stakeholders
• Support ISC change management and communications efforts, including support of major roll-outs and periodic updates

Risks to Reducing FTE:
• Less informed campus community due to reduced ability to provide timely communications, in-person training/roundtable sessions, and updated training materials
• Diminished initial and ongoing training will result in both campus administrators and ISC staff being inadequately prepared to perform their jobs
• Reduced opportunities for coordination with CBU owners and departments/units to drive alignment on policy, procedures and execution of transactions
• Responsibility to maintain ISC website will need to be absorbed by the CBUs
• Void in development of training or process improvement materials for both internal team and campus administrators