Goals

- Share TCU’s journey to transform HR
- Lessons Learned
- Opportunities at your institutions
- Where are we now?
Texas Christian University

- Founded 1873
- Private University in Fort Worth
- Enrollment: 10,918
  - Undergrad: 9,445
  - Grad: 1,473
- 2,274 Employees
  - Faculty: 669
  - Staff: 1,605

- Summer 2013: Human Resources became a division; hired first Vice Chancellor
- Summer 2015: nearly 100% turnover in leadership team
- Summer 2016: new VC
- Summer 2017: organizational transformation
- Summer 2018: prepare for new (to us) HR building; new technology
Observations

- One paperless process
- Outdated Talent Management system (not HRIS)
- Marginal connection with Faculty Hiring
- Problems with Data Integrity
  - Lack of systems integration
  - Manual processes
- New HR leadership team (less than three years at TCU/mostly new to higher ed)
- No identified HR liaisons or partners on campus
  - Most were budget or payroll contacts
- Resource misalignment
- New medical school (public/private partnership) first class Fall 2019
Observations continued

- Committed HR Leadership Team
  - Innovators; thought-leaders

- Committed HR Staff
  - New to higher ed; millennial-thinkers

- Chancellor willing to deploy resources
  - HR moves into new space Jan 2019

- Beginning of a strategic plan development process

- Senior Leadership
  - Chancellor’s Cabinet
    - Recruiting for Provost
  - Deans
    - 6 new deans in next 2 years

- Unprecedented Growth in over ten year period
  - Faculty: 478 to 682
  - Staff: 861 to 1,518

- Retirement-eligible: 408
  - Faculty: 172
  - Staff: 236
Polling Question

What is the biggest challenge facing your HR organization?

1. Inefficient manual processes
2. Lack of technology/automation
3. Lack of strategic services/capabilities
4. Historical reputation of HR
5. Lack of leadership support
To achieve the objective, Sibson completed the following:

- Conducted a thorough content review of a variety of documents, data, and other relevant materials
- Conducted 85 interviews of HR staff and stakeholders

**Approach and Methodology**

**Phase I**
Where are we today?

**Phase II**
Where do we want to be?

**Phase III**
How will we get there?
Provide an effective methodology and approach for assessing the quality, effectiveness and efficiency of the HR organization
Defining & Creating Organizational Excellence: A Road Map

2. Review of leading HR structures and practices within higher education and industry-at-large
Analyze the findings of the assessment and develop a roadmap for transforming HR.
Defining & Creating Organizational Excellence: A Road Map

Provide **thought leadership** and expertise in HR transformation, organizational design, and organizational effectiveness.
Defining & Creating Organizational Excellence: A Road Map

5. Identify potential barriers to successfully implementing HR improvements and recommend strategies for mitigating against those barriers.
Sibson assessed the HR function across the following five core dimensions and compared against best practices:

- **Assessment Approach and Methodology**
  - The alignment of HR practices, services, structures, processes and policies with the organization's strategic vision and goals.
  - The tools and technologies used to support HR functions, processes and transactions.
  - The cost to deliver and support HR services, programs, processes and systems.
  - The HR organization's structures, people, policies, rewards, measures, capacity and culture.
  - The processes by which HR services, programs and transactions are developed and delivered.
Summary of Findings

- **Strong and competent new HR leadership** as a key enabler to creating a best practice HR function
- Largely a **transactional function** lacking capacity to provide more strategic services
- Cumbersome, manual, and **inefficient core HR processes**
- Organizational **structure was an impediment** to fully meeting the needs of the campus
- **Lack of sufficient staff, capacity, skills, and competencies** in key strategic areas
Summary of Findings continued

- Historical lack of a consistently positive reputation on campus and a strong service orientation
- **Cultural challenges** within the HR organization
- Lack of a clear, well-articulated strategy and vision aligned with the strategic direction of the University
- Inconsistent and disjointed policy environment
- Opportunities to enhance some Key HR Programs and Initiatives
The Challenge and Solution: Migrate resources, investments, and functions from Administrative focus to Consultative and Strategic Focus
Workplace Trends Impacting Higher Education HR - Why Transform HR?

- Technology
- Aging Workforce
- New Generation of Workers
- Increased Competition for Talent
- Financial and Mental Wellness
- Diversity and Inclusion
The Challenge in Addressing These Trends

- Historical focus on compliance and “personnel” matters
- Historical lack of investment in HR systems and people
- Lack of enough people with the skills and competencies to build leading edge HR practices, services and programs
- Insufficient leadership sponsorship and support
Polling Question

How would you best describe your HR organization relative to these trends?

1. Fully evolved and strategic
2. Significant progress made toward modernizing HR and adding strategic services
3. Just beginning to modernize HR and add strategic services
4. Mostly transactional and consultative with little to no strategic services
In order to clearly establish the mission, identity, and vision for HR, we formally launched a strategic planning initiative for the HR unit.

- Strategic planning approach included the following:
  - Developed TCU HR mission and vision statements that reflect a strategic HR organization, and align with the objectives of the TCU Vision in Action: Lead On campus-wide strategic planning effort.
  - Identified key imperatives for HR to achieve its vision.
  - Determined new/expanded HR services and offerings and defined roles and responsibilities.
  - Created staffing and development plans.
  - Developed plans to revise and improve key HR programs and initiatives (new employee orientation, performance management, etc.).
  - Established plans for enhancing service levels.
  - Identified strategies and plans for improving HR’s culture.
  - Identified resource needs to support the plan.
The TCU HR Mission

The TCU HR mission will include the following:

- Taking the Lead On aligning with the University mission and vision
- Taking the Lead On ensuring a dedicated focus on the employee experience
- Taking the Lead On modeling and fostering a culture of inclusion and engagement
- Taking the Lead On being a strategic and innovative community partner
- Taking the Lead On serving as a champion for employee success
Supporting and sustaining TCU as a great place to work by building an innovative, dynamic, inclusive and engaged campus community
Imperatives
Things we must do to achieve our vision

EFFICIENT, QUALITY SERVICES
EXPANDED STRATEGIC HR SERVICES
SUCCESSFUL INTEGRATION OF TECHNOLOGY
POSITIVE REPUTATION AND BRAND
ENHANCED HR CULTURE
Process Mapping Overview

- A project team made up of HR staff (subject matter experts) and Sibson assessed which core HR processes needed to be redesigned in light of new technology implementations
- The team identified and mapped 13 processes in 3 key buckets

<table>
<thead>
<tr>
<th>Hiring Processes</th>
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<tbody>
<tr>
<td>• Requisitions</td>
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<tr>
<td>• Job Posting</td>
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<tr>
<td>• Clerical Testing</td>
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<tr>
<td>• Applicant Screening</td>
</tr>
<tr>
<td>• Job Offers</td>
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<tr>
<td>• Pre-Employment Onboarding</td>
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<tr>
<td>• Orientation</td>
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</tbody>
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<thead>
<tr>
<th>Performance Management Processes</th>
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</thead>
<tbody>
<tr>
<td>• Performance Appraisal Planning and Communication</td>
</tr>
<tr>
<td>• Performance Appraisal Process</td>
</tr>
<tr>
<td>• Performance Management Tracking and HR Review</td>
</tr>
<tr>
<td>• Executive Level (Chancellor’s Direct Reports) Performance Appraisals</td>
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</tbody>
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<table>
<thead>
<tr>
<th>Learning Management Processes</th>
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</thead>
<tbody>
<tr>
<td>• Adding a Course</td>
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<tr>
<td>• Registering for a Course</td>
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</table>
The process mapping working group identified 9 TCU groups that conducted HR processes in different ways. The goal was to streamline processes and gain efficiencies for all 13 processes across all 9 groups.

Each of the 13 processes was mapped for each of the 9 groups, utilizing experts from each constituent area and identifying differences and discrepancies across groups.
The team participated in a process mapping tutorial, which explains the swim lane process mapping methodology. For all processes, the team focused on:

- By engaging in this process, the team was able to step outside of their day-to-day work and view the process from an outside perspective.
- The team applied best practices and creative solutions.
- The team also incorporated all of the process maps into a new HR employee training manual for the future.

**Process Mapping Overview**

- **Current State**: Map process as is, identifying all handoffs, approval layers, paper forms, and steps in the process.
- **Future State**: Map process in an ideal future state, utilizing new technology, fewer handoffs and approvals, and ultimately less steps.
Example of a Current vs. Future State Process

- Removed 2 layers of approval
- Significantly reduced steps from 30 to 21
- Removed 4 decision points and approvals
The assessment revealed that policies were outdated, inaccessible, and in some cases, not fully compliant.

We launched a comprehensive inventory and redesign effort for key university-wide policies and practices, including the following steps:

- Established a policy committee to develop the framework for policy updates, initiation, and maintenance.
- Developed a clear and effective policy governance structure with responsibility for assessing, updating, and approving new policies.
- Designated a policy manager to maintain and oversee policies.
- Established a policy inventory that:
  - Identified policy gaps.
  - Provided detailed recommendations for policy revisions.
- Conducted a gap analysis to identify which policies were out-of-date, not readily available on the TCU HR website, and potentially inconsistent with TCU culture or regulatory standards.
Other “must have” policies include:

<table>
<thead>
<tr>
<th>Policy</th>
<th>Does TCU HR currently have policy on website?</th>
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<tbody>
<tr>
<td>At-Will Employment</td>
<td></td>
</tr>
<tr>
<td>Equal Employment Opportunity (EEO) statement</td>
<td>✔</td>
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<tr>
<td>Anti-Harassment</td>
<td></td>
</tr>
<tr>
<td>Reasonable Accommodation</td>
<td></td>
</tr>
<tr>
<td>Absenteeism/ Tardiness</td>
<td></td>
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<tr>
<td>Family Medical Leave Act</td>
<td>✔</td>
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<tr>
<td>Lactation Breaks</td>
<td></td>
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<tr>
<td>Safety and Weapon Regulations</td>
<td>✔</td>
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<tr>
<td>Meal/ Rest Periods</td>
<td></td>
</tr>
<tr>
<td>Benefits</td>
<td>Leaves, Vacation, Sick Bank, Tuition Assistance</td>
</tr>
<tr>
<td>Confidential Information/ Disclosures</td>
<td>Included in Code of Conduct</td>
</tr>
<tr>
<td>Drugs and Alcohol</td>
<td>✔</td>
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<tr>
<td>Electronic Communications</td>
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First Manager/Leader cohort began September, 2018

Working with 6 departmental committees to transform their organizations and culture

Using Focus Group findings to guide professional development programming

Introducing Unconscious Bias training campus-wide

Energized commitment to inclusion

Focused effort on diverse recruitment and selection practices

Operationalizing Workforce & Succession Planning

Established Diversity Advocates in academic units

Established HR Partners in one department and one college
Q & A

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Thank You!

Defining and Creating Organizational Excellence: A Road Map

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Sponsored by Cornerstone