Budget Officers Meeting

TIER Update

May 2015
Today’s Agenda

I. Sourcing & Procurement (Debby Zumbach)
II. Finance (Debby Zumbach)
III. HR (Kevin Ward/Richard See)
IV. ITS (Steve Fleagle)
April 2015

- Huron evaluated the University’s fund structure to determine how additional savings from this business case would impact the university.

May 2015

- Huron presented their findings and recommendations for 4 commodity areas:
  - Janitorial supplies
  - MRO
  - Computer peripherals
  - Computers and Laptops
The implementation phase of the Board of Regents' TIER (Transparent Inclusive Efficiency Review) project is underway on the University of Iowa campus. Our UI TIER leadership team has been working with Chazy Partners, the consultant hired by the Board of Regents to assist the institutions with the delivery of services model for IT, HR, and Finance, to put these next steps in place. Huron Consulting has also been working with members of our Sourcing and Procurement team on implementation processes and plans. Work on the academic cases is continuing as well.

TIER is an independent review of the academic and administrative expenses across Iowa's three public universities (University of Iowa, Iowa State University, University of Northern Iowa), as well as the regent system as a whole. We are seeking creative, new ideas for investing our resources so Iowa's public universities can uphold their long tradition of academic excellence. The goal of TIER is to transform our universities so they are sustainable for the long term and true to their core academic missions of education, research and service as well as learning, discovery and engagement.

The Board of Regents created TIER to look for ways to operate more efficiently and effectively—academically and administratively. The long-term vision of TIER is to contain costs, raise the quality of Iowa's public universities, and make Iowa a higher education destination.

http://onefinance.uiowa.edu/
Correction to Proposed Timeline

Finance Implementation Timeline

FY2015
Q2  Q3  Q4

FY2016
Q1  Q2  Q3  Q4

FY2017
Q1  Q2  Q3  Q4

FY2018
Q1  Q2  Q3  Q4

University-Wide Financial Shared Services Model

Detailed Design/Change Management
Infrastructure Building/Test
Implementation
Optimization

Not fiscal year – it is calendar year!
Purchase Order Receiving Changes

- ITS project to revamp receiving process
- Emails issued 2-3 days after voucher created to match with invoice image availability
- Focus group for review of functionality
- Easy navigation to outstanding receipts
- Q2 FY2016
Members of the Finance Advisory Committee are as follows:

- Scott Arneson, College of Dentistry
- Lori Cranston, College of Public Health
- Erin Herting, College of Liberal Arts & Sciences
- Richard Hichwa, Office of Vice President of Research
- David Ricketts, Business Services (Parking & Transportation)
- Joyce Ruplinger, College of Business
- Scott Seagren, Student Life (Housing & Dining)
- April Tippett, College of Engineering
- Amy Welter, International Programs

University Wide Shared Services

Transactions/Services

- **Potential** transactions and services for financial shared services include:
  - ✔ procurement card purchases
  - ✔ procurement card reconciliation
  - ✔ request for travel
  - ✔ travel expense vouchers
  - ✔ procurement requisitions
  - ✔ ebuy requisitions
  - ✔ general accounting entries (GLJE, PayCV, WebCV)
  - ✔ TDR reconciliation
  - ✔ components of cash handling
Chazey Partners summarizing data collected from the Stakeholder interviews, opportunity matrix & ABA survey.

Preliminary results suggest that the University has a significant savings opportunity by implementing shared services.

- April 2015 Shared Services Beta Site with Athletics 2 FTEs
- June 2015 Shared Services Beta Site with College of Dentistry – 1 FTE
- Chazey’s Benchmarking Report
University Wide Shared Services
What’s Next?

- Continue with Beta sites to determine what’s viable for implementation
- Validate ABA survey results & integrate transaction volume data in analysis
- Define transactions and services to be included in Shared Services
- Evaluate funding model options
- June 4th Chazey Presentation
- University moves forward
Staff Mobility During ERIP/TIER  
(current – June 30, 2018)

Goals:
Effectively match the right people with the right jobs
Maintain engagement and retention of staff
Provide opportunity/potential for future job growth and career development
Ease the transition issues for staff and assure timelines for change are met
Maintain compliance with EEO/AA
What HR Processes are Different/Same During ERIP/TIER?

<table>
<thead>
<tr>
<th>Different</th>
<th>Same</th>
</tr>
</thead>
<tbody>
<tr>
<td>➢ UI is considered as a single employer for reassignments Reassignment across orgs/departments occurs without creating a vacancy</td>
<td>➢ Merit staff may be reassigned to the same classification to avoid layoff within UI</td>
</tr>
<tr>
<td>➢ Able to consider multiple qualified staff without a search via ERIP/TIER Staff Opportunities Process</td>
<td>➢ Merit staff may be promoted to a classification within the Merit system or career shifted into a P&amp;S Classification based upon work requirements</td>
</tr>
<tr>
<td>➢ Immediately eligible for P&amp;S Career Promotion, Career Advancement and Career Shift without 6 mo experience requirement following modified documentation procedure</td>
<td>➢ Search procedures for vacant positions</td>
</tr>
</tbody>
</table>
Staff and Work Realignment

Accomplished primarily through reassignment of staff who are currently doing some or all of the responsibilities of redesigned job

- Reassignment may be in same job classification or a different one based upon responsibilities
- Reassignment may be in different department, college/division
- If reassignment results in career advancement, career shift or career promotion:
  - No requirement to perform new responsibilities for 6 months before classification change or pay adjustment
  - No requirement to submit a “Documentation of Career Development” form
  - Typically no pay decrease if shifted to classification at lower pay level
Staff and Work Realignment

Some work realignment may result in opportunities that can be filled through:

- Reassignment when multiple staff are known to be qualified – “ERIP/TIER Staff Opportunities Process” allows affected staff to express interest and ability to meet new responsibilities without regular search process

- Internal Search to fill a vacancy when current UI staff within department, college/division, General UI or UI have needed skills

- External Search to fill a vacancy when it is not certain UI staff have needed skills
When/What Flowchart

Work Needed

- Qualifed Staff for Reassignment?
  - YES
    - One person: Reassign to Same or Different Classification
    - Multiple staff: ERIP/TIER Staff Opportunities Process Results in Reassignment to Same or Different Classification
  - NO
    - Search Process
      - Internal
      - External
One IT@Iowa Updates

- One IT@Iowa
  - Steering committee formed, meeting weekly
  - Individual project leaders, teams, charters created
  - Program Office established
  - Project training/kickoff event last week
  - Starting to capture savings
OneIT@Iowa Updates

- Chazey update
  - Plan validation
  - Working on recommendations and final report
- ISU/UNI collaboration
  - Meeting scheduled for June 10 @ISU
- Early Retirement
  - 18 IT classified staff were accepted in early retirement programs