Position Management with Retroactive Salary Distribution

Vision

An enterprise position management system provides a record of all filled and unfilled positions for a defined set of employee types and integrates with existing Finance and HR systems and processes to enable consistent, accurate, and timely FTE data to support well-informed strategic decision making at the University, School, Unit and department level.

Objectives

1. Develop and execute a robust plan that delivers an enterprise position management system, which is integrated with HR and Finance systems.
2. Establish common position management definitions and practices that result in consistent data and processes.
3. Evaluate the feasibility of implementing a standard approach for supporting automated position requests and approvals while also offering an interface option to integrate with custom School and Unit solutions.
4. Design and provide analytic data models and solutions that leverage position data to support strategic decision making and reporting.
5. Deliver PeopleSoft functionality to apply retroactive salary distribution changes and reduce the volume of activity occurring directly in the General Ledger.
6. Introduce efficiencies in the budget system to enable University-wide adoption of position-level budgeting and variance analysis.

Key Performance Indicators

Planning KPIs

1. A governance structure is established that includes at least 50% of Schools and large Units (> 150 staff) and 100% of impacted enterprise application teams.
2. Outreach and communication engages HR and Finance from 100% of Schools and Units.
3. The implementation recommendation (scope, approach and timeline) is developed on or under budget.

Implementation KPIs

Specific metrics will be developed with input from project stakeholders during the Planning phase to establish KPIs in the following areas:

1. Reduction in time and resources spent supporting local position management solutions and workarounds.
2. Time required to generate reports and analysis regarding fluctuations in FTEs and salary expenses.
3. Average duration from request to approval for position requests.
4. Reduction in volume of journals submitted directly in the General Ledger to redistribute salary funding (14,705 such salary journals in FY16).
5. Percentage of Schools and Units adopting position level budgeting in HUBS.

Guiding Principles

- Project governance is strategically engaged to ensure that functionality design and prioritization effectively balance institutional and School/Unit needs to provide the desired benefits at both levels.
- Project governance and execution is built upon a strong joint partnership of Finance and HR stakeholders.
- Opportunities for introducing functionality and integrating data and systems via a measured and phased approach are carefully considered in order to deliver incremental value and reduce overall project risk.
- Analysis and design of the business processes that support position management is as critical to the success of the project as is the technical design of the solution.
- An Agile methodology will be used, as appropriate, to manage the project planning and execution.