<table>
<thead>
<tr>
<th>Project Statement: Talent Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program: Banner Initiatives</td>
</tr>
<tr>
<td>Created and submitted by: Vic Kiel</td>
</tr>
<tr>
<td>Process Owners: Chyerl Wolfe-Lee</td>
</tr>
<tr>
<td>Date Created: April 2, 2014</td>
</tr>
<tr>
<td>Date Modified: December 5, 2014</td>
</tr>
<tr>
<td>Version: V7</td>
</tr>
</tbody>
</table>
1 Current Situation

This section addresses the current situation with our current learning management, recruiting/applicant tracking, and performance management applications. The current applications are collective of unrelated home grown and commercial applications; none of which communicate effectively, if at all, with the university’s enterprise resource planning (ERP) system, Banner. These systems require a considerable amount of administrator and IT programmer time to keep them running while returning less than desired or needed service or products such as effective reports, quality employee acquisition, compliance and certification tracking, talent development, performance appraisals, skills & competency management and succession management.

1.1 Learning Management

WWU ATUS developed a learning tracking application built on a Microsoft SQL database with a web front end. It allows administrators to enter courses, schedule classes and mark attendance. It allows participants to register for classes and submit a form of additional training, to be included in their transcript, which they have attended. In addition, departments are using a variety of shadow databases, Excel workbooks and paper files in an attempt to manage and report learning. The WWU Training application does not:

- Include any (individual, supervisor, director, executive) reporting capabilities, thus failing as an effective communication and decision making tool
- Allow the supervisor to assign training to an individual’s training plan
- Identify, set due dates or track mandatory training or certification requirements
- Support attachments
- Interface with Banner, Canvas or a performance management application

1.2 Recruiting / Applicant Tracking

Western purchased the NOVUS HR recruiting/applicant application in September 2004. For the next two years, WWU worked with NOVUS Solutions to design an application that would be workable for WWU. WWU went live with NOVUS HR (EASE) in November 2006. It has been in use and modified several times since 2006. The NOVUS HR application does not:

- Provide the ability for applicants to print their application materials
- Provide the ability for applicants to see what has been attached to their application before submitting
- Provide real-time search status (Is the position currently reviewing applications? Interviewing?)
- Provide the ability to manipulate job title so it fits nicely on the job posting (have option to line break)
- Provide the ability to update postings (title) without having to redo an entire Job Posting Request
- Provide the ability to post jobs under more than one department without making it a whole different search (more and more we are seeing split appointments between two colleges/departments who both want to be represented in the postings)
- Provide the ability to search by recruitment number
- Provide the ability to enter in dispositions without having to open each application separately
- Provide the ability for a search coordinator to only allow certain applications to be viewed (currently this is a setting per user; all search committee members see all applications – departments would like the ability to filter out applications that have already been determined to not meet minimum qualifications)
- Overarching permission role (currently HR has to put themselves into every search in order to be able to review applications, pull reports, etc.)
- Allow for on-the-fly workflow updates, which subsequently requires the use of three separate esign forms to facilitate approvals and communication
- Fully support cross-browser functionality
1.3 Performance Management

Western acquired a free application from Spokane Community College in 2009 called EPAS (Electronic Personnel Appraisal System). Since the acquisition, a majority of the application has been rewritten by ADMCS. It is basically a home grown application. The EPAS (Electronic Personnel Appraisal System) is very limited, it does not:

- Include adequate reporting capabilities, thus failing as an effective communication and decision making tool
- Allow for outside (non-WWU) 360 review participants
- Allow for supervisor initiated evaluation changes nor provide automatic evaluation progress updates
- Allow for weighting of evaluation values
- Allow for customizing evaluations for employee classes, divisions, departments, 360 input
- Automatically send reminders or send more than one reminder
- Support attachments
- Allow for configurable mandatory/required evaluations
- Have a robust spelling check function
- Allow for multiple job evaluations
- Allow for multiple supervisors
- Allow for electronic signature
- Interface with Banner
- Interface with a learning application

2 Project Overview

The timing of software purchase or implementation is dependent on state funding.

2.1 Phase 1 – Discovery/Research

2.1.1 Scope:

In this phase we will define the needs for each module: recruiting/applicant tracking, learning and performance management. We will conduct research by viewing demonstrations from vendors, getting feedback from other institutions and agencies, and conduct a RFP, if necessary.

2.1.2 Deliverable

- Milestones:
  - Budget request: February 2015
  - Phase 1: December 2015
- One-time budget and permanent budget requests
- Needs assessment document for each module
- Software/vendor recommendation to process owner and steering committee for each module

2.1.3 Potential Budget

- $15,000
2.2 Phase 2 – Implementation

2.2.1 Scope
In this phase we will purchase the software subscriptions. We will implement each module in succession. Implementation will include, in conjunction with the vendor, configuring the application, migrating data, populating the data, perform testing, developing and conducting training.

2.2.2 Training
Training for all levels, from individuals to executives, is critical in the successful implementation of all modules of the Talent Management solution. As such, training needs, development and implementation will be a major milestone in the implementation of each and every module of the recruiting, learning and performance management applications.

2.2.3 Deliverable

2.2.3.1 Learning Management
- **Milestone:** July 2016
- Configure the application for Western
- Initial implementation of BFA training requirements (approx. 80% of staff training)
- Migrate data from the WWU training database and other data sources (i.e. EHS databases, FM data, etc.)
- Populate training libraries
- Develop and conduct training

2.2.3.2 Recruiting/Applicant Tracking and Onboarding
- **Milestone:** December 2016
- Configure the application for Western
- Migrate data from Novus
- Develop and conduct training

2.2.3.3 Performance Management
- **Milestone:** April 2017
- Configure the application for Western
  - The first phase is for professional staff employees and further discussion to include classified staff and faculty
- Migrate data from EPAS
- Populate competency libraries
- Develop and conduct training

2.2.3.4 Potential Budget
- Permanent: $105,000 per year plus “CPI” in out years
- One-time request: $250,000 (first year only)

Dependent on software selected

2.3 Phase 3 – Post Implementation

2.3.1 Scope
In this phase we will review the project for lessons learned to complete a project closeout document and a list of any outstanding tasks.
2.3.2 Deliverable

- **Milestone**: December 2017
- Project Closeout Document
- Outstanding Task List

2.3.3 Potential Budget

- None identified at this time. Post implementation support will be split between power users and technical specialist in HR.

3 Project Goal

Moving to a centralized software-as-a-service (SaaS), cloud/web-based technology will reduce overhead costs associated with maintaining our individual unrelated applications currently required to manage these tasks. It will seamlessly consolidate the employee life cycle from recruiting to learning to performance. It will give the end-user a comfortable feel and touch, leading to a satisfied end-user experience. The University will benefit from real time, meaningful reports to be used for tactical and strategic decisions: from hiring to training requirements to performance assessments and succession planning.

Analyze various options and alternatives to determine the best way to leverage technology to improve the business processes and reduce the overhead costs within WWU. This approach allows us to meet our objectives of continuously improving efficiency, reducing costs, and capitalizing on technology. The recommended Talent Management Project will methodically migrate the data and functions of our various current systems to a new web-based platform in order to preserve data integrity and allow adequate time to train all employees and managers on their responsibilities and respective administrative functions. The web-based platform is compatible with all other current IT systems (Banner and Canvas) and will improve the efficiency and accuracy of reporting throughout. These tools will provide the following along with detailed and summarized reports for individuals, supervisors, directors and executives for use in tactical and strategic decisions:

3.1 Learning Management

- Facilitate employee learning - Employees can browse learning opportunities, enroll and attend courses online, complete assessments, view learning plans and transcripts
- Provide Compliance Training and Employee Development - Supervisors, directors and executives can manage, track and report on each employee’s or employee group learning and development. Supervisors are able to assign and approve employee or employee group learning, monitor progress and proactively provide due-date notifications to ensure compliance
- Reduce Learning Costs – Central point of all training for effective and efficient assignment, monitoring and reporting. Provides event administration and automated registration and roster administration
- Interface with Banner
- Interface with Canvas, our current online learning system

3.2 Recruiting / Applicant Tracking

- Create, publish and manage job postings online
- Create new postings from previous job descriptions or templates, and schedule posting open and close dates
- Create workflows that match our organization’s requirements and support multiple paths for various hiring scenarios
- Maintain a library of screening questions to easily identify minimum and preferred qualifications
- Customize the requisition process to ensure the proper approvals are secured and the process is followed
- Interface with Banner
3.3 **Performance Management**
- Performance Management: Align business strategy with the goals of our workforce in addition to managing tasks enterprise-wide
- Skill & Competency Management: Identify competency and skill gaps within our organization using 180- and 360-degree feedback, self-assessments and competency models
- Succession Management: Identify and proactively address workforce planning issues and opportunities
- Interface with Banner

4 **Functional Areas That Will Be Impacted**

|                      | Academic Affairs | Business Services | Capital, FM, Safety & Parking | Enrollment & Student Services | Financial Services | Human Resources & Payroll | Information Technology | Internal Audit | Internal Control | Legal & Policies | Outside Consultant | Budget Office | University Advancement | University Relations | All Others |
|----------------------|------------------|-------------------|-------------------------------|-------------------------------|--------------------|-------------------------|-----------------------|---------------|-----------------|----------------|---------------------|----------------|-----------------------------|---------------------|----------------|---|
| Impacted             | X                | X                 | X                             | X                             | X                  | X                       | X                     | X             | X               | X               | X                   | X              | X                           | X                  | X             | X |
| Resources Required   | X                | X                 | X                             | X                             | X                  | X                       | X                     | X             | X               | X               | X                   | X              | X                           | X                  | X             | X |
### 6 Team Members

#### 6.1 Core Team Members

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
<th>Name/Title</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Owner</strong></td>
<td>Provides project vision and leadership</td>
<td>Chyerl Wolfe-Lee</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Assistant Vice President for Human Resources</td>
</tr>
<tr>
<td><strong>Performance Management</strong></td>
<td>Advises team on performance management process improvement needs and techniques</td>
<td>Doug Adelstein</td>
</tr>
<tr>
<td></td>
<td></td>
<td>HR Associate Director, Labor/Employee Relations</td>
</tr>
<tr>
<td><strong>Recruitment Management</strong></td>
<td>Advises team on recruiting/onboarding process improvement needs and techniques</td>
<td>Lea Aune</td>
</tr>
<tr>
<td></td>
<td></td>
<td>HR Assistant, Director</td>
</tr>
<tr>
<td><strong>Process Improvement</strong></td>
<td>Advises team on process improvement techniques</td>
<td></td>
</tr>
<tr>
<td><strong>Learning Management</strong></td>
<td>Advises team on learning process improvement needs and techniques</td>
<td>Derek Dashiel</td>
</tr>
<tr>
<td></td>
<td></td>
<td>HR Assistant, Director Process Improvement</td>
</tr>
<tr>
<td><strong>Learning Management</strong></td>
<td>Advised the team on compliance training, certification and reporting needs and techniques.</td>
<td>Sue Sullivan</td>
</tr>
<tr>
<td><strong>Technology</strong></td>
<td>Advises team on technology process and requirements</td>
<td>Bob Schneider</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Director, Administrative Computing Services</td>
</tr>
<tr>
<td><strong>Analyst</strong></td>
<td>Analyze and document project meetings and processes</td>
<td>Vacant</td>
</tr>
<tr>
<td><strong>Project Manager</strong></td>
<td>Manages the business case and project team</td>
<td>Vic Kiel</td>
</tr>
<tr>
<td></td>
<td></td>
<td>HR Management Systems Mgr</td>
</tr>
</tbody>
</table>
6.2 Additional Sub-Team Members (Consulting purpose)

<table>
<thead>
<tr>
<th>Name</th>
<th>Department</th>
<th>Module/ Roles</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADMCS Rep</td>
<td>Administrative Computing (AA)</td>
<td>Technology support and data migration</td>
</tr>
<tr>
<td>Rom Marks</td>
<td>Human Resources (BFA)</td>
<td>Learning</td>
</tr>
<tr>
<td>Sue Guenter-Schlesinger</td>
<td>Equal Opportunity Office (AA)</td>
<td>Recruiting</td>
</tr>
<tr>
<td>Ichi Pencil</td>
<td>Provost (AA)</td>
<td>Performance, Learning &amp; Recruiting</td>
</tr>
<tr>
<td>Melissa Reed</td>
<td>Human Resources (BFA)</td>
<td>Performance Management</td>
</tr>
<tr>
<td>Stephanie Ludemann</td>
<td>Human Resources (BFA)</td>
<td>Recruiting</td>
</tr>
<tr>
<td>Buyer (TBD)</td>
<td>Business Services (BFA)</td>
<td>RFP Consulting</td>
</tr>
<tr>
<td>Linda Teater</td>
<td>Budget Office (BFA)</td>
<td>Performance, Learning &amp; Recruiting</td>
</tr>
<tr>
<td>Sara Wilson</td>
<td>Enrollment &amp; Student Services (ESS)</td>
<td>Performance, Learning &amp; Recruiting</td>
</tr>
<tr>
<td>Catherine Shornick</td>
<td>College of Humanities &amp; Social Sciences</td>
<td>Performance, Learning &amp; Recruiting</td>
</tr>
<tr>
<td>Pete Lockhart</td>
<td>Professional Staff Organization (PSO)</td>
<td>Performance, Learning &amp; Recruiting</td>
</tr>
<tr>
<td>Nida Hernandez</td>
<td>Associated Students</td>
<td>Recruiting</td>
</tr>
</tbody>
</table>

7 Relationship to Banner Initiatives Objectives

The Talent Management Project directly supports the mission, vision and several strategic goals of Western Washington University and the Business and Financial Affairs division.

The Talent Management Project will enable us to more effectively meet the University strategic goals of “Building upon Western's strengths to address critical needs in the State of Washington” and to “Serve as a model for institutional effectiveness, innovation, diversity and sustainability.” We will be able to deliver best-in-class services updating business practice to utilize current technology and processes, engage the University community in planning and implementing changes, and communicate effectively with our University community.
Banner Initiatives – Talent Management Project Definition

<table>
<thead>
<tr>
<th>Business Goal/Objective</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Timely and accurate reporting</td>
<td>Web based tools will allow real-time and accurate reporting of recruiting, performance and training metrics</td>
</tr>
<tr>
<td>Improve staff efficiency</td>
<td>Empowers employee and supervisors to be more involved with the workforce development</td>
</tr>
<tr>
<td>Reduce employee turnover</td>
<td>Greater autonomy and flexibility will address employee concerns and allow managers to focus on tasks</td>
</tr>
<tr>
<td>Reduce overhead costs</td>
<td>Fewer staff required to maintain the legacy and shadow systems</td>
</tr>
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**Banner Initiatives Objectives**

- Simplify and automate business processes by implementing best-in-class practice
  - Minimize human errors
  - Improve data integrity
  - Reduce process cycle time and unnecessary paperwork and handling
  - Increase productivity and improve accuracy
  - Integrate systems and reduce/eliminate redundancy and shadow systems
- Improve services to campus and boost customer satisfaction
- Improve reporting capabilities on:
  - Management reports
  - State and federal reporting requirements
- Deliver effective training program to all identified end-users across different departments prior to “go-live”
- Provide efficient post implementation support to end-users

### 8 Risk Assessment

<table>
<thead>
<tr>
<th>Risk</th>
<th>Impact</th>
<th>Mitigation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single vendor suite does not have the best-in-class for each module</td>
<td>Does not meet the requirement of best-in-class for module</td>
<td>Separate contracts Create sub-projects</td>
</tr>
<tr>
<td>Amount of time available to team members to dedicate to testing, configuring and populating the applications above their normal workload</td>
<td>Implementation delayed</td>
<td>Build time into the work breakdown structure to off-set resource availability</td>
</tr>
<tr>
<td>Insufficient communication with campus</td>
<td>Resistance to change in processes or forms</td>
<td>Hold communication sessions to announce project, explain benefits and answer questions</td>
</tr>
<tr>
<td>Insufficient training</td>
<td>Lack of adoption by employees, supervisors and directors.</td>
<td>Conduct classroom training Create electronic tutorials / job aids</td>
</tr>
<tr>
<td>IT support for data migration (learning and recruiting)</td>
<td>ADMCS resources may be strained due to competing resources (other projects)</td>
<td>Delay rollout Seek consulting help</td>
</tr>
</tbody>
</table>