

HRIS Improvement Project

Position Management

- Job Descriptions
- Position Requisition
- High priority
- Org Community

Applicant Tracking System

- Search Committees
- Job Postings
- Applications
- High priority
- Org Community

Onboarding

- Org Community
- High Priority
- automates/electronic flows

Learning Management System

- High priority
- May need to be separate system
- Internal Org Learning Design & Administration
- Org Community
- For personal learning record
- For registration

Performance Management

- Org Community
- High priority
- Culture change
- System improvements
- Skill based improvement

Case Management

- Low priority
- Internal to HR

Performance Management

Skill Development

- Critical Conversations
- Receiving Feedback
- Giving Feedback
- Written reviews
- Trainers
- Writing Plan

System Needs

- RFP for different system
- Improve current system
- Accurate Reporting & Data
- Integration
- Data Security
- Ease of Use

Process/Cycle

- Engagement between supervisor and employee
- Phases
- Frequency

Culture

- Org Values
- Org Mission
- Integration into employment lifecycle
- Why does it matter

HRIS Improvement Project

Community Needs from HRIS	HR Needs from HRIS	System Needs	
Ease of use	Position Management	Integration with Banner	
Reliable data	ATS	Ease of administration by HR / ITS	
	Onboarding	Reliable data and reporting	
	Performance Management	Ease of data retrieval from system	
	LMS		
	Case Management		

Positive Framing and Generative Questions

Critical Questions to ask organization's community:

- For each of the current modules (ATS, Performance Management, Position Management):
 - What is working well?
 - What functionality do we currently have that we need to keep? What functionality are these modules missing?
 - What is intuitive or easy to use?
 - What do new and current employees have difficulty with?
- What additional modules of an HRIS would be helpful? Or what would you like to see automated?
- For each of the possibly new modules (Onboarding, LMS, other):
 - What would you like to see a module of _____ be able to do?
 - What would be most helpful if we were able to include a module of _____?

Critical Questions to ask payroll and budget personnel:

- For each of the current modules (ATS, Performance Management, Position Management):
 - What is working well?
 - What functionality do we currently have that we need to keep? What functionality are these modules missing?
 - What is not intuitive or easy to use?
 - Where is administration of the system working? Where is administration of the system NOT working?
 - Where do we need integrations that work well?
 - What reporting and data needs do you have?
 - What additional modules of an HRIS would be helpful? Or what would you like to see automated?
- Tell us about reporting and data needs you want in a new system overall and within various modules

Design Process

**These concepts are specifically focused on the Performance Management sub-project of this greater HRIS project. Each of the modules in the HRIS has specific skill and user enhancement, as well as a systems piece to it. As such, the process for each of the modules will be very similar but tweaked for the context of that module. Overall, the systems pieces from each module will fit together to inform improvements to the current software solution and additional modules, or going out for an RFP to evaluate other software solutions, or some combination thereof.

So, below is an outline of the process designed for the performance management sub-project:

Engage greater human potential

Foundation: Dialogic approach to change management for performance reviews. This foundational element of a dialogic approach was a running theme throughout our course of study and the various methodologies of dialogic organization development (OD), appreciative inquiry, design thinking, and action research. All of these methodologies spoke to the importance of engaging the community in the process during the discovery or research phases, the design phases, the implementation and feedback phases to varying degrees. In *Dialogic OD*, Bushe (2013) actually references a variety of tools including appreciative inquiry, open space and world café.

Define Phase:

- Define the scope of the project (see above)
- Draft the design brief and project charter to gain approval to move forward
- Assign project managers – in this case, co-managers: the HRIS Manager and myself HR Director

Discover phase:

- Discover “what is”:
 - Pull historic completion rates for the university and each division.
 - Pull completion rates by phases
 - Pull completions by supervisor to discover who starts but doesn’t finish, who never starts, and who completes.
 - The above data will help inform how we engage the community and in what types of sessions.
- Pull research and materials that will help demonstrate to employees and supervisors why performance feedback is important and how it can be used without merit pay.
- Set up community engagement sessions which will likely include the following types with representation from across all divisions and levels of the university, but this will change based on part of the data research discovery: (1) supervisors, (2) employees with no supervisory responsibilities, open invite sessions, (4) senior leaders

- Generative questions, positive framing
- Inviting spaces for all community members
- Sharing research on the importance of feedback
- Discovering user needs
- Discovering system issues and needs (and formally documenting them)
- Critical questions to ask in addition to the above will include
 - what is working well for supervisors who successfully move through the existing process
 - what skills do those successful supervisors use during each step and conversation with their employees
 - what do successful supervisor do to make it meaningful for the employees and themselves
 - how might the newly developed job descriptions help with these conversations
 - what additional resources and skills do managers and/or employees need to be successful in this process
 - what outcomes are supervisor and/or employees seeking from this process
- Identify insights and trends from these sessions and research of data

Dreaming:

- During this phase, it will be important to engage the community through smaller working groups based on the lessons learned and information gathered above.
- New generative questions and discussions can then lead these smaller working groups into a brainstorm phase for designing the new performance review program and system needs, as well as user needs for both skills and outcomes.

Design:

- Subject matter experts will largely make up this phase of the project with a small number of community representatives from leadership, supervisors, and employees. This group should be no more than 8-12 people in size. The subject matter experts will require at least representatives from HR, (including HRIS Manager, HR Partner, HR Director, Director OD) and ITS.
- The design phase will include two major areas: (1) designing for the human-centered approach to performance management and engagement, and (2) system needs.
 - The human-centered approach will need to address frequency, phases, connections to our mission and values, and effective feedback skills.
 - The systems design will also need to address frequency, phases, and connections to our mission and values, as well as integration and ease of use.
 - Moreover, a critical decision will come out of this phase to either design improvements to our current software solution, or go out for a new program. The criteria for this decision will need to wrap in feedback from the larger HRIS project and needs from the other modules.

Development & Deployment:

- The above process will roll out from March 2020 through November 2020.
- By November, we will need to make a decision on HRIS system improvement or moving to an RFP process to look at other software solutions.
- From December 2020 through July 2021, we will work through two processes:
 - Developing the human-centered improvement resources, training, communications, materials for helping our supervisors and employees have effective conversations regarding performance
 - Developing and launching an RFP or improvement project with vendors.
- The ultimate goal would be to have improved processes and systems to roll out to our community in August & September 2021.
 - If our current system is improved, it will roll out to our entire community.
 - If a new system is purchased, it would roll out to a test group for the 2021-2022 academic year so that we can test, tweak and improve it before launching to the entire community.
- Skill development is always an ongoing process. As learning systems and tools are delivered to our community, we will engage in feedback to continue to help our employees grow in this area.