

**San Bernardino
Community
College District**

Dec 12 – 13,
2011

**Business Process Analysis:
Hiring and Payroll Processes**

with Strata Information Group



Workshop Objectives

As part of the effort to improve District Services, Strata Information Group (SIG) is working with San Bernardino Community College District to analyze and improve several underlying processes. This analysis yields two primary outputs: 1) identification of significant opportunities for improvement, and 2) ideal process maps to be used to set the trajectory for the consideration of a new ERP. The objectives are to improve service to the Colleges, to develop streamlined processes, and to take full advantage of technology.

To meet the objectives, a two-day Business Process Analysis (BPA) workshop was conducted to examine the hiring and payroll processes, along with the exit process, at SBCCD, San Bernardino Valley College, and Crafton Hills College.

. The objectives of the workshop included the following:

- Review the principles of Business Process Analysis (BPA)
- Map the existing processes
- Analyze the process maps and identify obstacles and potential opportunities for improvement
- Design new processes that enhance service, reduce steps, and take full advantage of technology
- Identify next steps and set the trajectory toward the “ideal” process

Participation was fantastic – group members were engaged, thoughtful, and creative. Stakeholders came from Human Resources, Payroll, academic and administrative departments, and DCS. Kari Blinn, from SIG, facilitated the workshop. Sheri Willis, also from SIG, provided her expertise and guidance during the sessions. Participants articulated the issues with the current processes – and developed ideas for a new process. This document contains the contents and outcomes of the group’s efforts.

Observations

During the course of the workshop, participants identified issues with the current hiring, payroll, and exit processes. Themes included:

- Process is long
 - More than 100 steps
 - Long time from start to finish
 - Many groups involved – with a lot of back-and-forth – opportunities for miscommunication and errors
 - Paper-driven
 - Inefficient
 - Many approval layers
- Using many different, disconnected systems
- Many redundancies in the process – checking and re-checking same data, entering data multiple times
- Expensive process – waste of resources
- Lack of clarity across the process
 - Not traceable
 - Not transparent

Participants

There was terrific participation during the workshop. Representation was both broad and deep. This lends significant weight to the ranking of opportunities. It also represents momentum moving forward.

San Bernardino Valley College

Karen Deck	Administrative Secretary Social Sciences or
Linda Tymchek	Administrative Secretary Humanities
Rose Garcia	Administrative Secretary Science
Shari Blackwell	Administrative Assistant Student Services
Laura Gowen	Administrative Assistant Instruction
Susan Bangasser	Dean Science
Cory Schwartz	Dean Social Sciences
Fernando Martinez	Maintenance & Operations Coordinator
John Stankas	Faculty

District

Cheryl Burge	Human Resources Generalist
Tommi Ng	Human Resources Generalist
Jeremiah McFarland	Human Resources Generalist
Amalia Perez	Human Resources Generalist
Lorraine Norton	Administrative Assistant, HR
Angie Ontiveros	Payroll Supervisor
Penny Ongoco	Director Fiscal Services
Alisa Moore	Director of Marketing and Public Relations

8TH Street Annex

Andrew Chang	Interim Director, EduStream
Everett Garnick	Director, DCS
Jeremy Sims	Director, Technical Services
Laz Mascarenhas	Senior Technology Support Specialist
DyAnn Walters	User Liaison
Jon Kyle	Telecommunications Specialist

Crafton Hills College

Joe Cabrales	Dean, Student Services, Student Development
Kirsten Colvey	Dean, Student Services, Counseling & Matriculation
Mike Strong	Interim Vice President Student Services
Sharon Chavira	Administrative Secretary, Math, Physical Science, Health
Elizabeth Morabito	Administrative Secretary, EOPS
John Muskavitch	Director, Financial Aid
Wayne Bogh	College Director, Technology Services
Julie McKee	Faculty

Top Opportunities

Over the course of the workshop, participants identified many opportunities for process improvement. At the end of the session, they participated in an anonymous weighted voting exercise. Each participant was given ten “votes.” An individual could place all her votes on a single opportunity or spread her votes among several.

This allows us to identify which opportunities the group deems most important for SBCCD. The top four items reflect emerging consensus around several critical changes.

# of Votes	Opportunities
41	Procure an integrated system (ERP) – end-to-end processing
30	Enter data once
23	Remove/eliminate redundancies in the process
22	Remove approval layers
13	Develop good communication plan – with the candidate, hiring committee members, etc.
13	Streamline on-boarding notifications
12	Set up all accounts, keys, codes, etc. at time of hire
10	Eliminate paper process
10	Develop clear exit process
9	Use positions approved via Program Review as the definitive trigger to start the hiring process
7	Clarify all processes
6	Transparency, overcome mistrust
6	Move all faculty and staff to same calendar – MS Outlook
5	Use same principles for all employee classes
5	Shred documents after imaging
4	Maintain a list of potential hiring committee members – identify members early in the process
4	Provide support for process improvements from the top – time and money
4	Ensure security and confidentiality
3	Provide a clear “trigger” to start the hiring process
3	Develop process to update data after employee is on board – ensure it’s up to date

Next Steps

Based on the opportunities identified and ranked, the group developed a set of next steps to advance the opportunities.

TOP OPPORTUNITIES	STEPS
<p>Develop plan to procure an integrated system (ERP)</p>	<ul style="list-style-type: none"> • Review outcomes of BPA workshop with Chancellor’s Cabinet – Jan 2012 • Conduct cost analysis and requirements review between Datatel and other ERPs – Feb to Apr 2012 • Create an ad hoc committee to develop system requirements – identify needs and prioritize • Secure funding • Communicate clear direction by late spring <p>(Leaders: Dr. Glen Kuck and Charlie Ng)</p>
<p>Secure improvements to the hiring process</p>	<ul style="list-style-type: none"> • Test PeopleAdmin enhancements, including end users – Jan 2012 • Provide training – Feb 2012 • Remove approval layers <ul style="list-style-type: none"> ○ Identify clear trigger to start hiring process – “approved: ok to hire” – then don’t route back for “more” approval ○ Ensure that hiring manager has both authority and responsibility for budget ○ Recommend changes to Chancellor and Presidents • Identify funding to fully deploy PeopleAdmin functionality <p>(Leaders: Dr. Glen Kuck and Charlie Ng)</p> <ul style="list-style-type: none"> • Update workflow in PeopleAdmin <ul style="list-style-type: none"> ○ After securing approval up front, remove steps to route for approval ○ When new employee is hired, trigger workflow notification to Tech Services to set up basic access • Develop clear roll-out plan to communicate new process and features <p>(Leaders: Human Resources)</p>
<p>Advance short-term improvements (“low hanging fruit”)</p>	<ul style="list-style-type: none"> • Image and shred documents – start with HR • Simplify and consolidate forms – start with Work Report

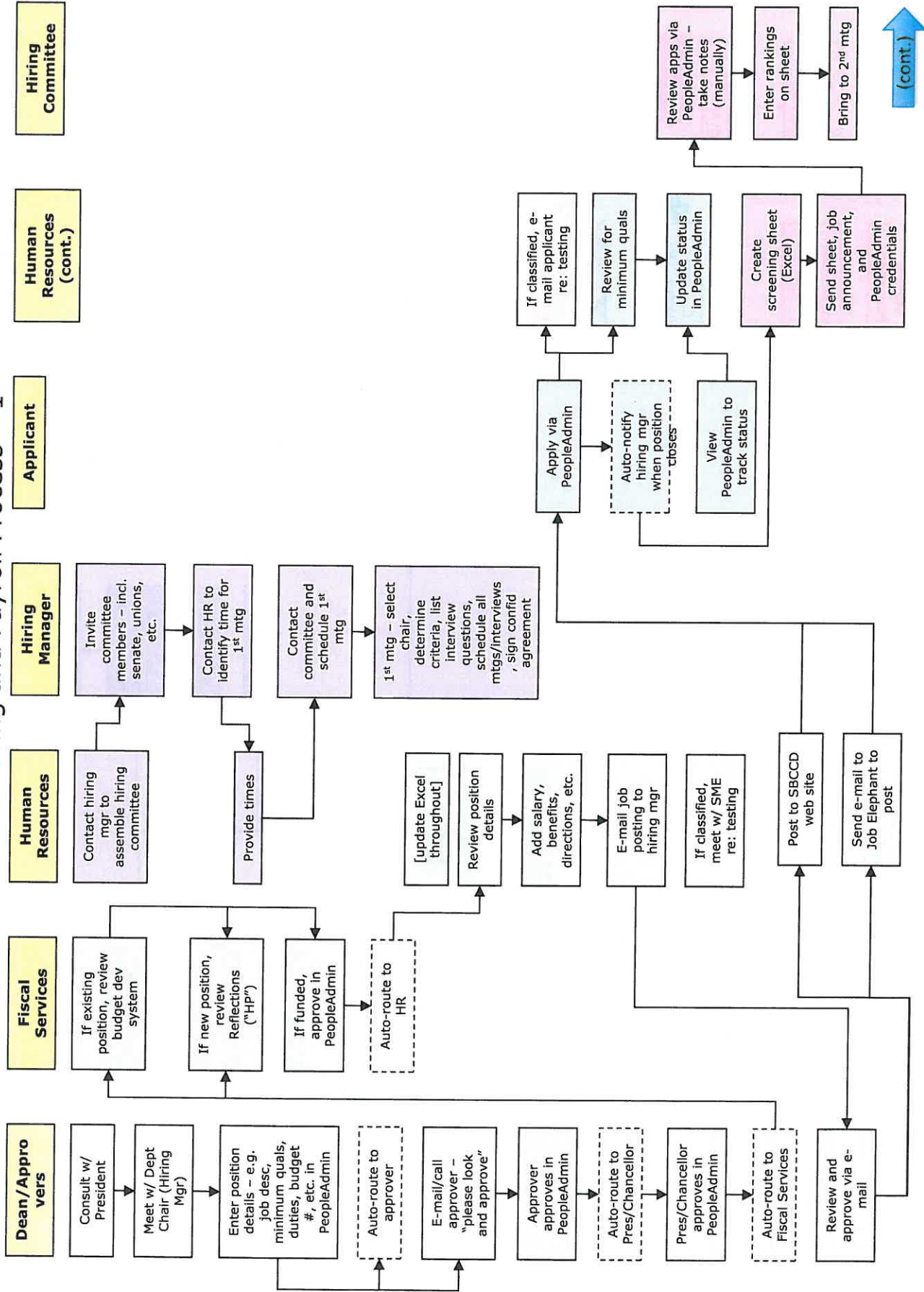
Process Maps

Mapping processes with stakeholders serves as a vehicle to:

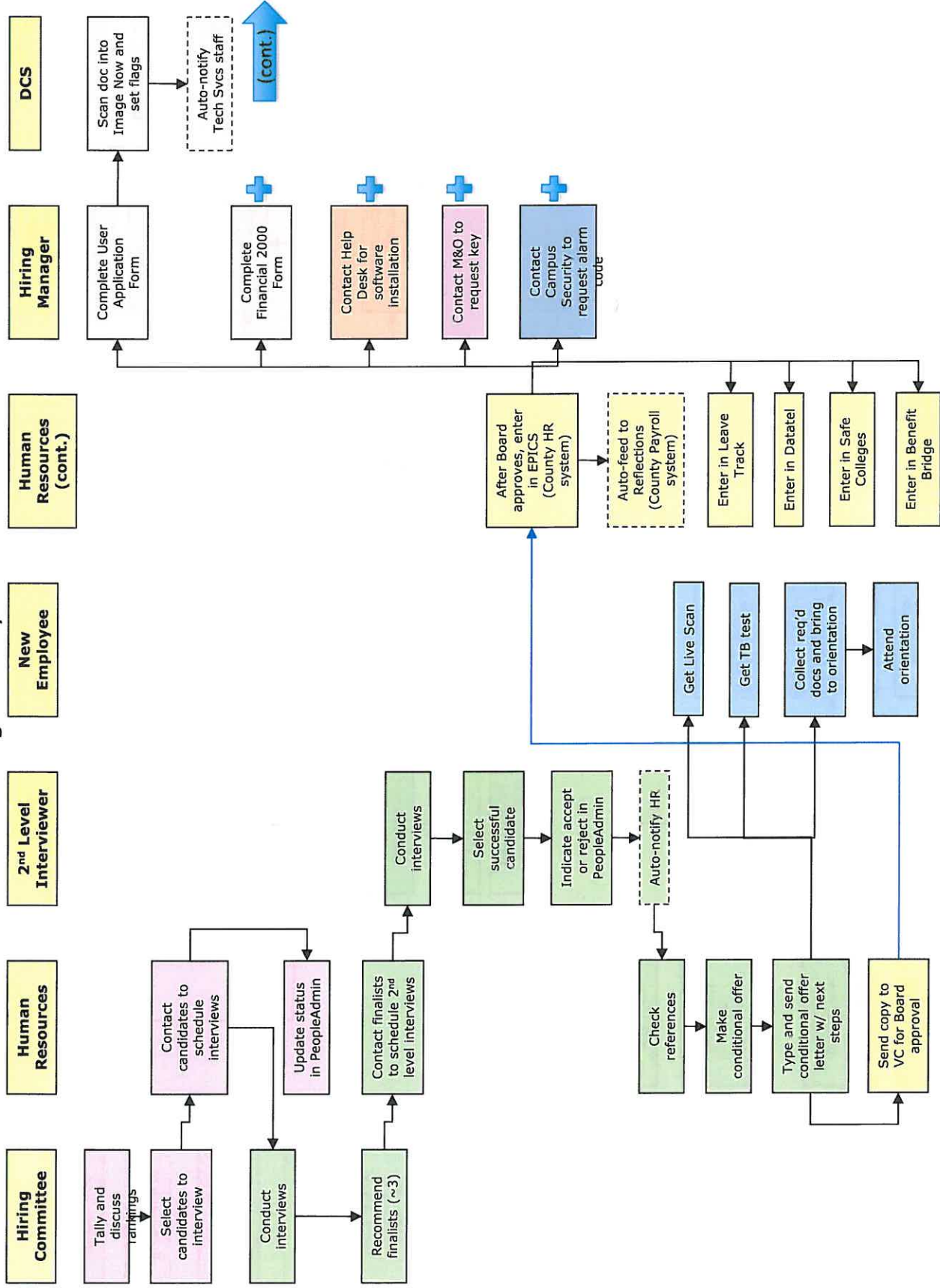
- Identify issues with the current processes
- Work together to develop clear, streamlined, consistent processes
- Take full advantage of technology

The pages that follow include the maps of the current processes, objectives for the new process, and an “ideal” process map. The idea is to use the ideal map as a guide for the District and the Colleges as they evaluate options to improve processes and consider new technologies.

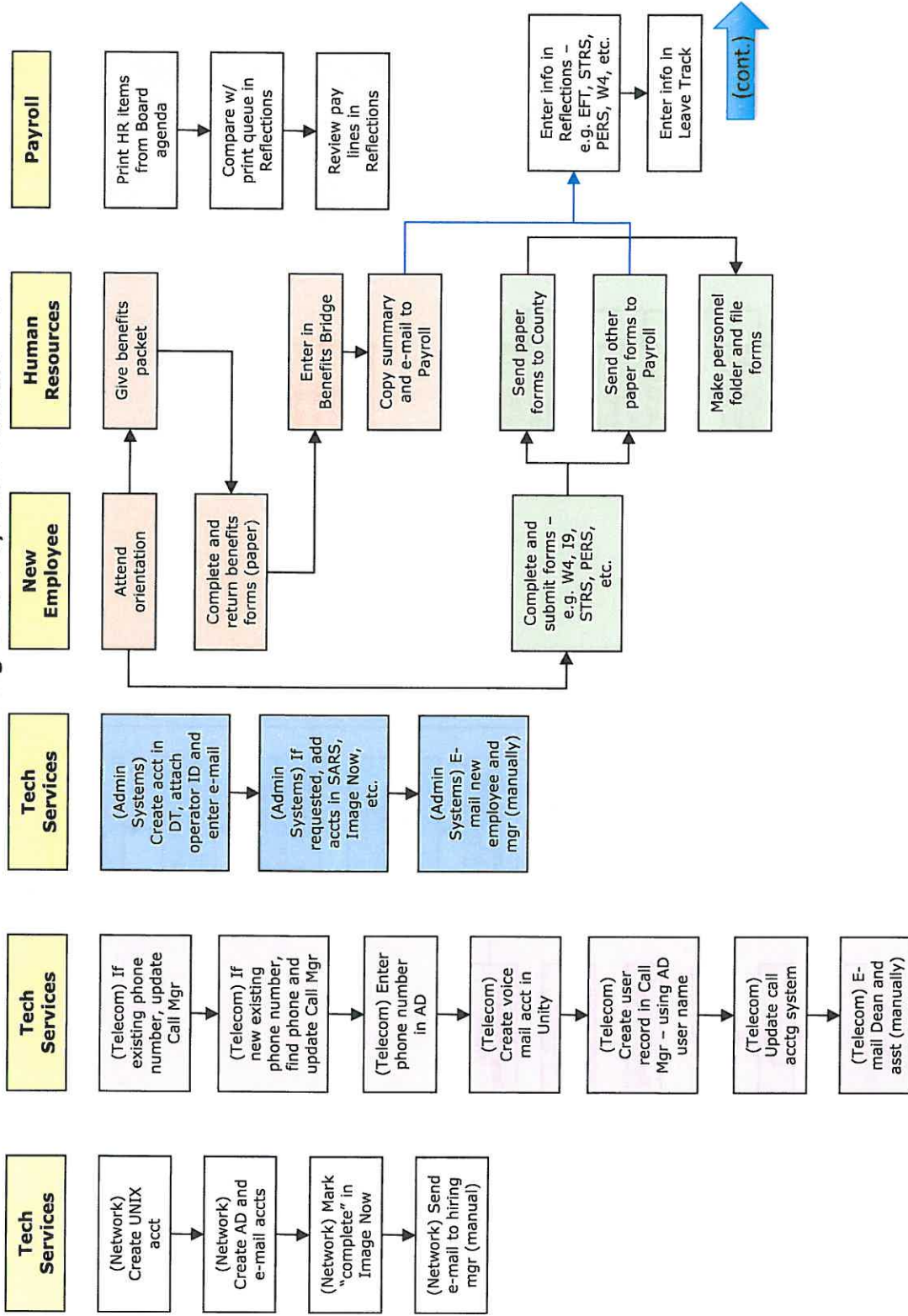
Current Hiring and Payroll Process – 1



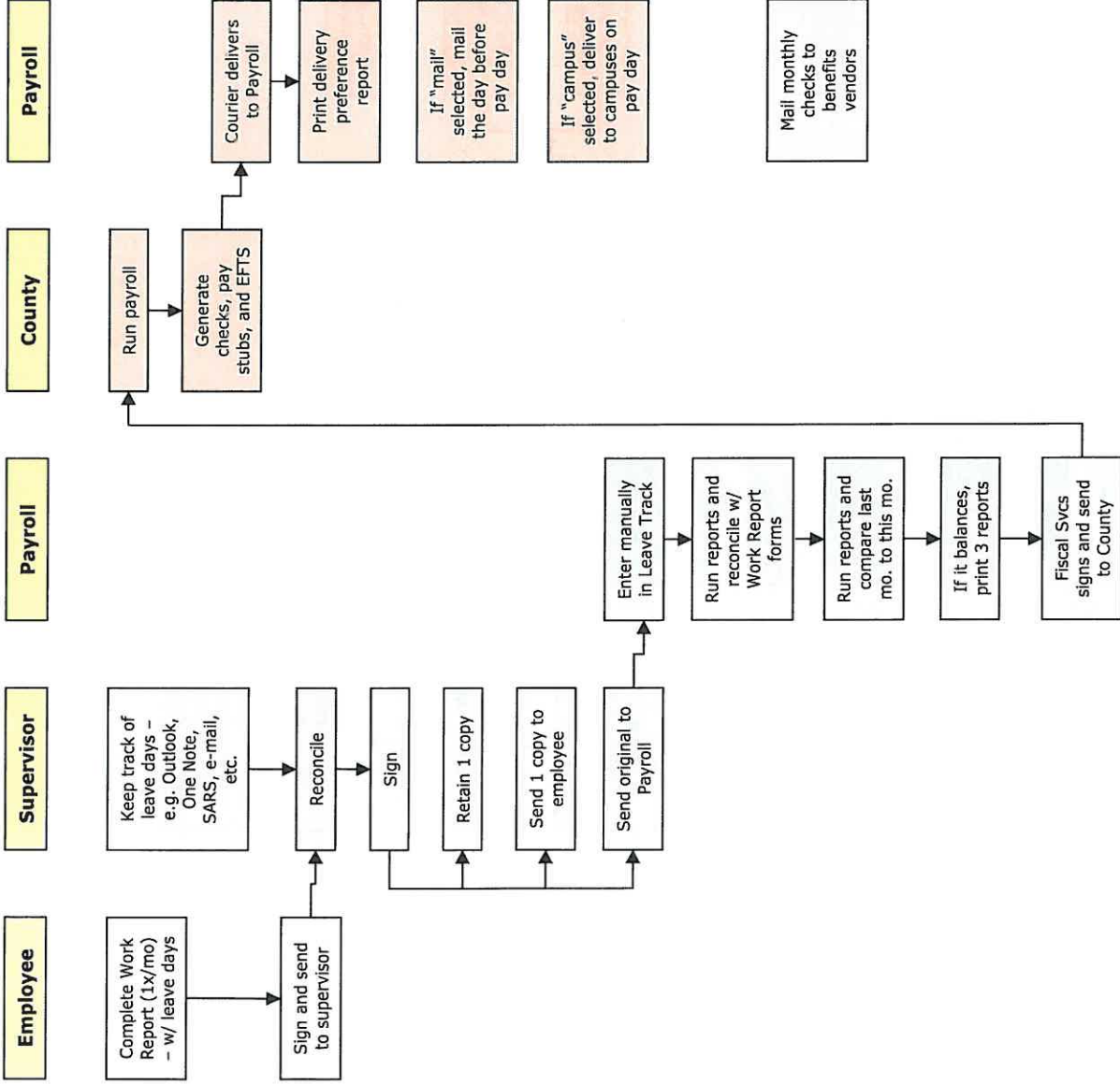
Current Hiring and Payroll Process – 2



Current Hiring and Payroll Process – 3



Current Hiring and Payroll Process – 4

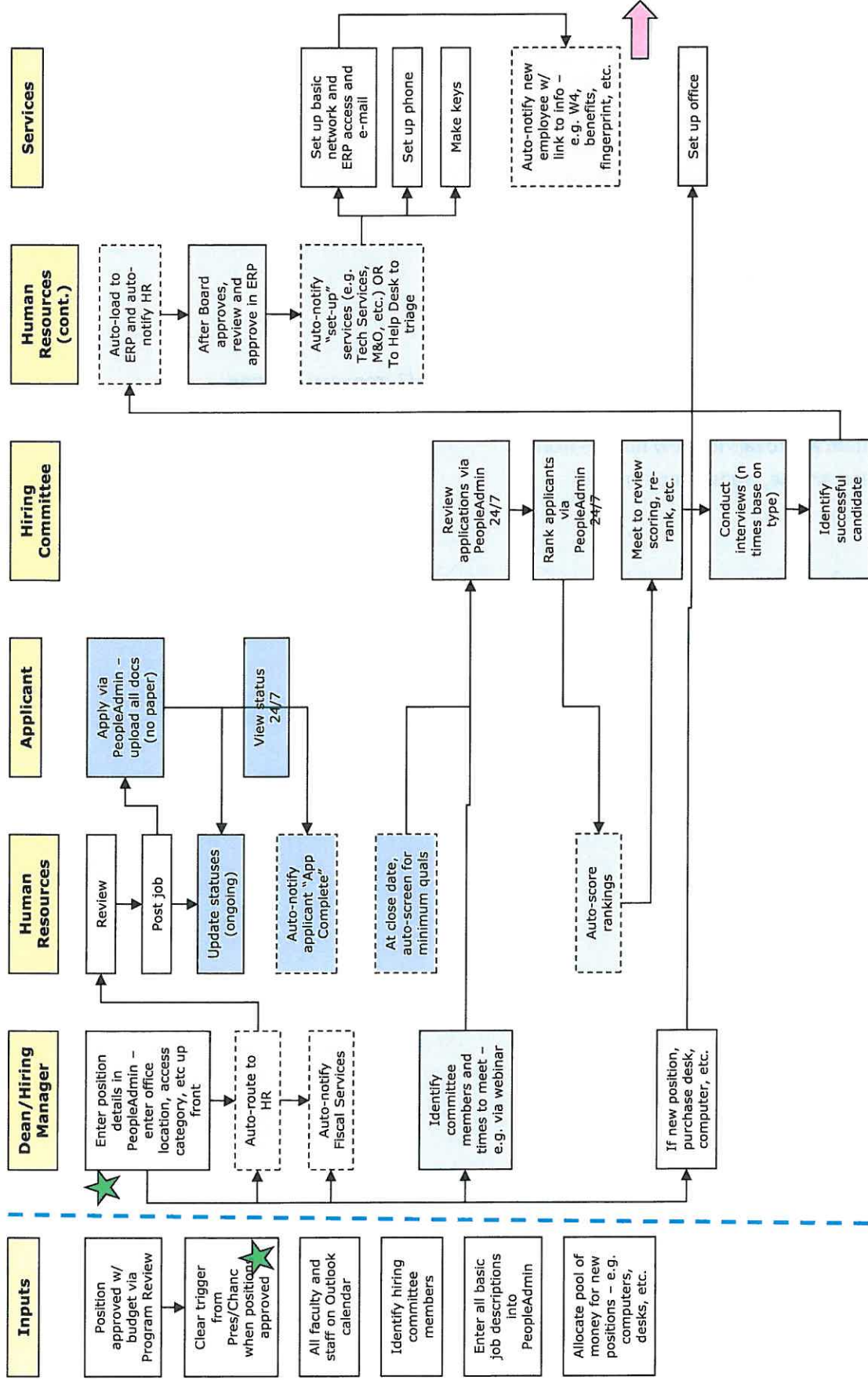


Objectives for New (“Ideal”) Process

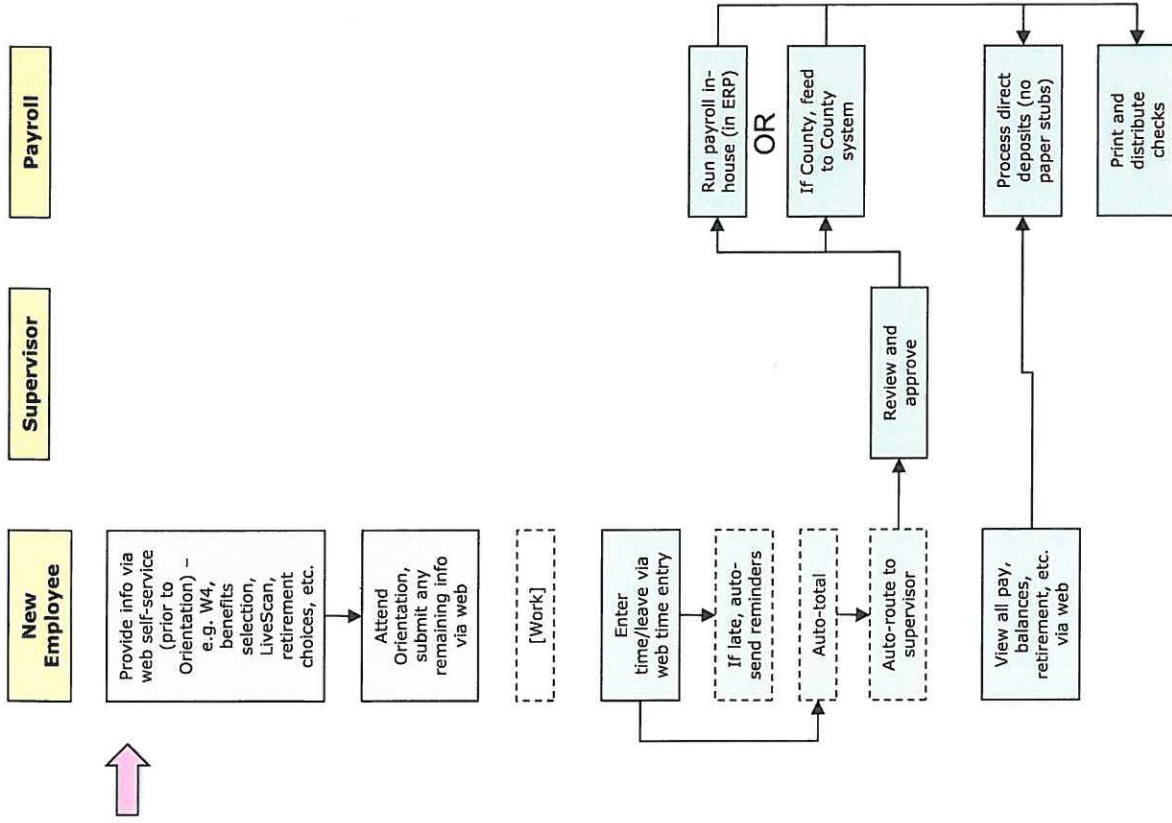
The following objectives and assumptions were used in developing “ideal” hiring and payroll processes:

- Attract and retain the best people
- Provide better service to new employees
- Make better use of everyone’s time
- Shorten process from start to finish
- Single, integrated source of data
 - Easy to use
 - Enter data once
 - Eliminate need for shadow systems
- Eliminate paper
 - Allow stakeholders to view information 24/7 from any location
 - Use system to trigger next steps
- Obtain approvals for new hire up front
- Clear, simple, transparent process

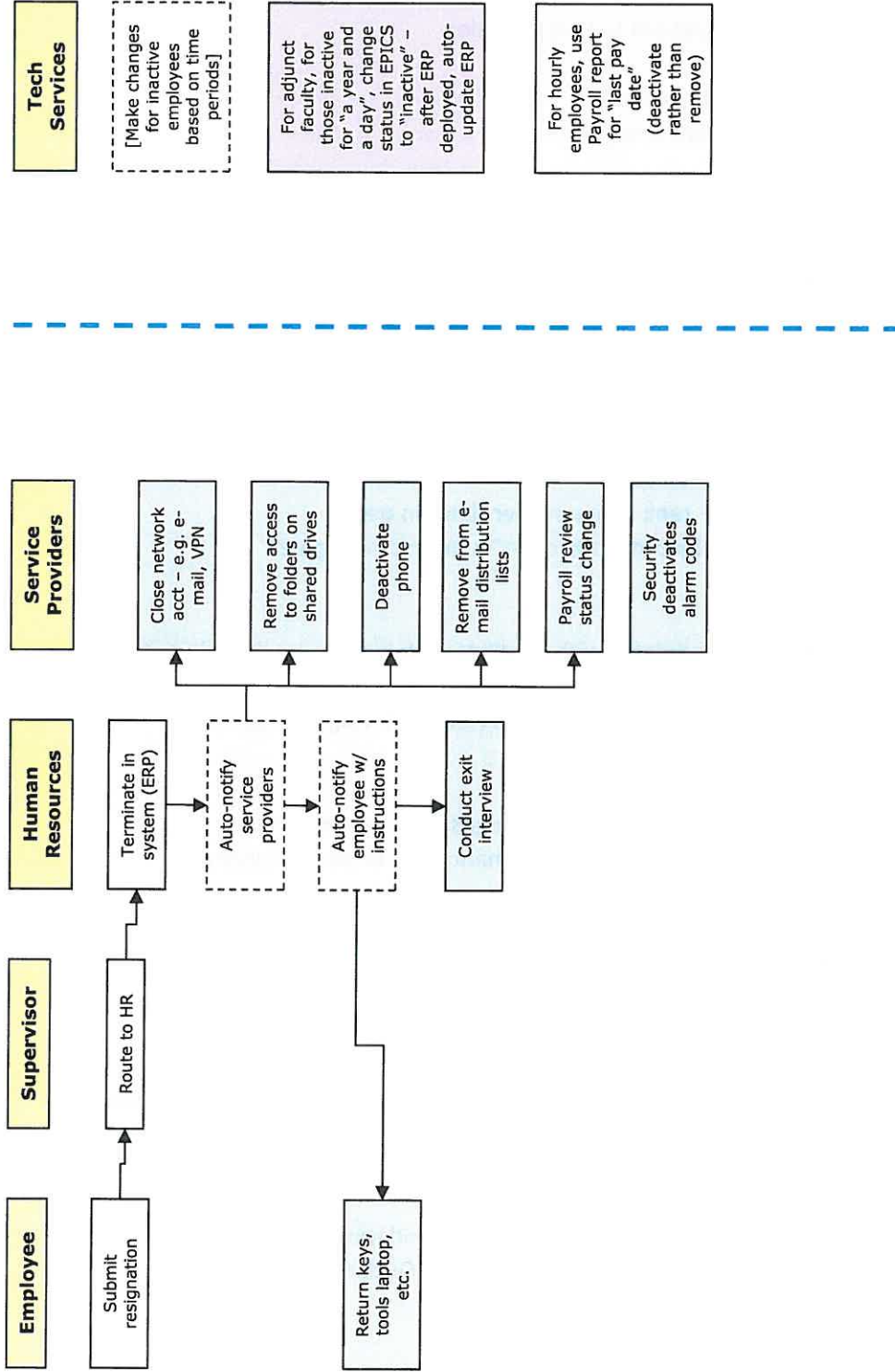
Ideal Hiring and Payroll Process – 1



Ideal Hiring and Payroll Process – 2



Ideal Exit Process



APPENDIX A

Opportunities for Improvement

In brainstorming fashion, participants identified the following opportunities. (These are not listed in ranked order, nor do they necessarily represent consensus.)

Hiring Process

- Better utilize Program Review to identify and approve new positions
- Transparency – overcome mistrust throughout the organization
- Clear trigger “OK to start hiring”
- Pre-populate fields from prior job announcements
- Send reminders when routing through approval layers
- Remove approval layers
- Consider position requisition “approved”
- Disaggregate approval and notification – one stops the process, one serves as an “FYI”
- Add “advertise in these locations” to position requisition
- When position is approved, encumber funds up front
- List representatives interested in serving on hiring committee
- Hiring committee members be identified in a system
- Consider other ways to “meet” – e.g. webinar, Skype, teleconference, etc.
- Everyone on same calendar – MS Outlook
- Let PeopleAdmin screen for basic minimum quals
- Use PeopleAdmin for screening sheets – rank online rather than on paper
- “Sign” confidentiality by accessing PeopleAdmin and click “I understand/agree”
- Clarify relevance of testing
- Image and shred documents
- Explore accommodation for “strong” candidates with conflicts with interview schedule or teleconference
- More flexibility in the number to send to second level
- Training; i.e. hiring committee members, second level interviewers, hiring managers
- Include hiring manager in first meeting
- Send concerns/likes from first to second level
- Why reference checks? Could check only for weapons charges, harassment, etc.
- Once approved to hire in PeopleAdmin, auto-notify Vice Chancellor for Board approval
- Streamline onboard notification; e.g. access to systems
- New employee submits documents and/or enter information prior to coming to campus
- Basic orientation initially, then provide more detail later
- Use other media for orientation; i.e. video, self-guided tutorials
- Deploy integrated system (ERP)
- Use PeopleAdmin to identify criteria, score rankings, etc.
- Write general job description for all faculty positions – don’t start from scratch every time, ensure consistency
- Continuously recruit adjunct faculty – store applications in PeopleAdmin in order for Deans to search for qualified instructors
- Mandate and train all faculty and staff to use MS Outlook for calendaring
- Allow functionality to auto-load instructor’s teaching schedule to Outlook
- Develop a good communication plan

APPENDIX A (cont.)

Opportunities for Improvement

Payroll

- No pointless notifications
- Cleanup Active Directory and integrate with Call Manager
- Set it ALL up at hire
- Enroll online via Benefits Bridge
- Fiscal independence
- Electronic personnel “file”
- Web time entry
 - Auto-notify if late
 - Auto-escalate if late
 - Auto-notify with link when its time to enter
- Self-service for employees
- Review small percentage of a random sample rather than 100% audit
- Opt out of paper pay stub (view on Best Net)
- Electronic W2s
- All MIS data extracted from ERP
- All checks to vendors sent from Accounts Payable

Exit

- Clean-up employee directories
- Clean- up Active Directory – obtain list from Payroll
- HR notifies Tech Services upon hire
- Provide education
 - Submit resignations to HR
 - Provide clear, step-by-step instructions on web – e.g. return keys, laptop, exit interview, etc.
- Terminate accounts after set time period – decouple time periods between HR from Tech Services
 - Student employees – terminate in HR after 2 years, deactivate accounts after one term
 - Adjunct faculty – terminate in HR and deactivate accounts after “a year and a day”

APPENDIX B

Obstacles

In the same manner, participants identified the following obstacles:

Hiring

- Politics around positions; trust, how/who gets approved?
- How to define quality of service (how to measure)?
- Paperwork
- What is trigger to hire? When can we start the process?
- Approval process is outside of Program Review
- Approval queue for position requisitions
- Out-of-date approval queues
- Temporary positions still require paper
- Clarity for budget numbers
- Requisition process not integrated
- HP and Budget Development systems don't talk with each other
- Choke Point – Director of Fiscal Services approves all
- Extra budget for special advertising
- Advertising timeline too short for classified
- HR uses spreadsheet to track status of requisitions – shadow system
- Department uses spreadsheet to encumber new position – shadow system
- Budget transfers
- Delay in responses from hiring committee members
- Varying hiring committee approval processes at the colleges
- Calendars not on Outlook – i.e. faculty schedules
- Need for broad representation on hiring committee
- Review of minimum qualifications for specialized positions
- Some processes use paper applications
- Credentials aren't secure
- Testing lengthens process; screening for right qualities?
- Interview selection process varies by site/college
- Only one day for candidates to interview or they are out of luck
- Requiring three candidates
- Lack of knowledge of hiring committee members
- Some employees start before results of Livescan
- Notification to DCS to setup email, phones, access, etc.
- Multiple data entry

APPENDIX B (cont.)

Obstacles

Payroll

- Workstation obstacles
- Typewriter, “wet” signature, multi-part forms
- No phone inventory
- Employee email address in Colleague
- Entry not consistent (phone numbers, email, etc)
- Campus Central vs. WebAdvisor
- District DCS vs. College responsibility
- New hire – PERS vs. STRS
- Entry of faculty into Colleague
- Leave reports are dated
- Employee is out for time sheet deadline
- BestNet has poor interface
- MIS employee data is manually entered
- Signature required each month for overload contracts
- Different sheets for different employee classes
- HR finds out about resignations later or after the fact
- Mailing direct deposit stubs – defeats the purpose of automating
- Difficult to know when position is truly approved
- Resources needed to implement new system – e.g. backfill, temps, overtime, etc.
- Not knowing when process or policy changes occur
- Board meeting dates – must submit very early
- Available funding
- Abusing leave
- Errors on MIS reporting if terminate employees too quickly
- Faculty not deactivated in Datatel
- Lists/directories persist on web long after employee leaves