



University of California
San Francisco

2015 SPA Results
& SPA 2016 Committee Recommendations
HR Advisory Board Presentation

Agenda

- Annual SPA Process
- 2015 SPA Results
- SPA sub-committee membership
- Staff committee outcomes
- Academic committee outcomes
- Next steps

Annual Service SPA Review Process

Annual Process:

- HR SPA process calls for an annual review of the agreement.
- Committee recommendations are sent to the HR Advisory board for review/approval.

Current Status:

- Staff and Academic SPA committees met in September and October to develop recommendations.
- Human Resources process owners reviewed the recommendations of the committee
 - Confirmed metrics and general changes
 - Developed effort estimates for process improvement suggestions
- HR feedback was sent to SPA committees

Next Steps:

- HR Advisory Board approval of updates SPA, edits as needed.
- Post and communicate updated SPA (Target January 2016).

2015 SPA Results

- SPA subcommittees approved SPA report format in March 2015
- Monthly report distribution started in May 2015
- The MPM funding change reports available on-demand via MPM system.

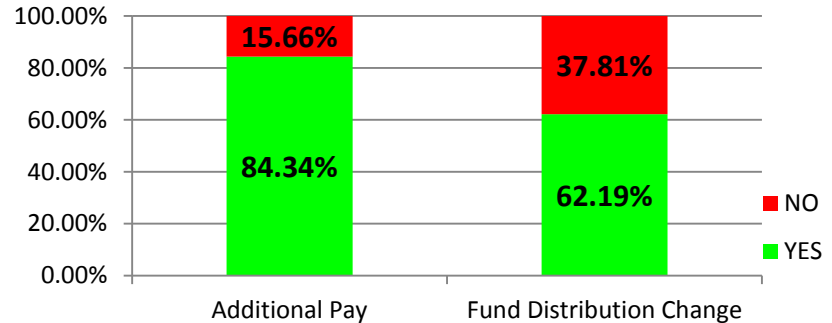
| SRS SPA Report Transaction Volume (2015) | |
|---|--------|
| Academic - Fund Change | 3,724 |
| Academic - Additional pay | 2,177 |
| Staff - Fund Change | 7,726 |
| Staff - Recruitment (Replacement) | 772 |
| Staff - Recruitment (New) | 1,225 |
| Staff - Reclassification | 484 |
| Staff - Equity | 151 |
| Staff - Campus Locator | 501 |
| total | 16,760 |

2015 SPA Results cont.

Academic

- The academic “separations” turnaround metrics was after March SPA committee review.
- Additional Pay and SRS Fund Change target success have gone up 8% and 4% since March 2015.
- The 2015 MPM fund change target success rate is 87.7%

Academic SPA Success - Overall January 2015 - December 2015

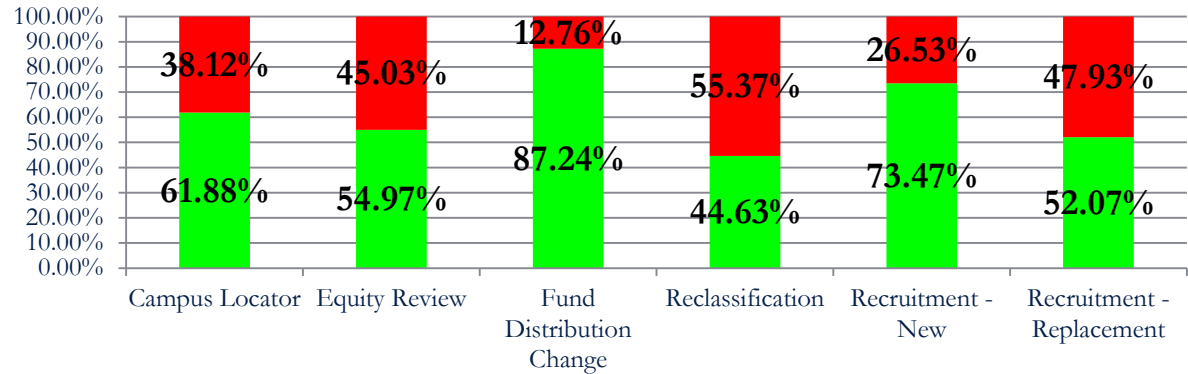


2015 SPA Results cont.

Staff

- Overall average target success is up 1.1% since March.
- Equity review and campus locator results have gone down by 11% and 7% respectively. Both are low volume transactions

Staff SPA Success - Overall January 2015 - December 2015



2015 SPA Results cont.

Performance reporting is being used to monitor / improve performance.

- Monthly trend reports have helped to identify operational impact of staffing and process changes.
 - Example: Academic Funding Changes (SRS) show year-over-year improvement but on-time performance fell in Fall of 2015, changes being made now to address the change.
- Transaction detail available for department and HR analysis.
- SPA reporting will continue in 2016.

SPA Subcommittee Recommendations

Fall 2015

- SPA sub-committee membership
- Staff committee outcomes
- Academic committee outcomes
- Next steps

Service Partnership Agreement Workgroups

| Academic Workgroup |
|--|
| Esther Carmona – Manager, Transaction Services, HR |
| Esther Carter – Director, Postdoc/Trainees, HR |
| Cheryl Drassinower (co-chair) – Director, Academic Shared Services, HR |
| Brian Groves – Director, Intl Students & Scholars Office |
| Larisa Kure (co-chair) – MSO, Microbiology & Immunology |
| Emerald Light - Manager, VPAA, HR |
| Carol Miller - IT Applications Coordinator, VPAA, HR |
| Carla Pagsanjan – Manager, Academic Shared Services, HR |
| Laurae Pearson - Director of Administration, DOM SFGH |
| Ken Pinstler – Director, Operations & Finance, SON |
| Carroll Schreiber, Associate Chair, Admin & Finance, Anesthesia |
| Nancy Walters - Director, SOP Dean's Office |

| Staff Workgroup |
|--|
| Esther Carmona – Manager, Transaction Services, HR |
| Thomas Cunningham – Director, Finance & Operations, Cancer Center |
| Clarice Estrada (co-chair) – Chief Administrative Officer, CVRI |
| John Giacomi – Executive Director, Facilities Services |
| Nanette Grimm – Manager, Staff HR Shared Services |
| Georgina Lopez – Director Finance & Admin, Global Health Sciences |
| Suzanne Murphy – Director, Business Services, EVC&P |
| Marge O'Halloran – Director, Research Management Services, RMS |
| Katy Rau – Director, Staff Shared Services, HR |
| Judy Rosen – Manager, Disability Services, HR |
| Richard Secunda – Director, Administrative Services, SOM Dean's Office |
| Kelly Sheridan – Manager, Campus Labor / Employee Relations, HR |
| Jason Stout (co-chair) – Manager, HR Strategy, HR |
| Holly Wong – Director, Administration, Psychiatry SFGH |

Staff SPA committee recommendations

High-level summary

- The committee recommends no substantive changes to the services and roles sections of the agreement (Sections 1-3, 5)
- The committee recommends keeping all existing service commitment metrics with no changes to the target turnaround times.
- The committee recommends adding 3 service commitment metrics.
- The committee developed 7 new process improvement priorities and provided a rank order based on impact and difficulty.

Staff SPA – Service commitments







| Activity | System | Population | Target Turnaround |
|---|--------|------------|--|
| Funding changes and renewals: from user approval of the transaction until transaction is completed within SRS | SRS | All Staff | 4 business days |
| Recruitment Request: from date of request approval to the date of the posting | SRS | All Staff | New Hire: 10 business days Replacement: 5 business days |
| Compensation: between user approves the transaction and the transaction is completed within SRS | SRS | All Staff | New Hire Salary: 2 business days ^a (NEW) Stipends: 5 business days ^b (NEW) Reclassification: 20 business days Equity Review: 15 business days Retention Equity: 2 business days ^c (NEW) |
| Campus locator: between user approves the transaction and the transaction is completed within SRS | SRS | All Staff | 3 business days |

^a Client must submit all required documentation and salary requirements(if any)

^b Client must complete all required SRS ticket fields

^c Client must provide written competing offer letter and submit recommended salary to HR

Proposed - Staff Process Improvements









| Item | Description | 2016 Work plan |
|--------------------------------|--|--|
| Offer Letter Standards | <ul style="list-style-type: none"> • HR to serve as default offer letter creator; departments wishing to create offer letters may do so upon negotiation with HR • Link offer letter generator to ticket |  |
| Job Advertisement Option Tools | <ul style="list-style-type: none"> • Summary of posting options and tools for selection of search firms |  |
| Salary Setting Process | <ul style="list-style-type: none"> • Provide job aids and clarify requirements of various steps in process • Breakdown of SRS ticket to sub-tickets to measure each step in hire hire requests • Improve SRS to require forms necessary in salary setting process |  |
| Premium Recruitment Service | <ul style="list-style-type: none"> • Developing job descriptions and posting summaries that attract the right type of candidate for the position (eg. Help manager remove insider acronyms) • Active search to find qualified candidates • Screening of candidates to determine top 2-3 candidates referred to manager. | Develop a more detailed needs assessment |
| Return for Changes | <ul style="list-style-type: none"> • Enhance SRS to include return reason code • Add detail about change requirements to return message |  |
| Website | <ul style="list-style-type: none"> • Develop client engagement team and user group • Enhance search feature |  |
| Funding Changes | <ul style="list-style-type: none"> • Develop tool for reconciliation of DPE to requested changes |  |

Academic SPA committee recommendations

High-level summary

- Update services provided (section 1) to move recruitment to VPAA.
- The committee recommends 2 service commitment updates:
 - Change funding changes from 4.5 days to 5 days
 - Remove separations as a metric
- The committee developed 8 new process improvement priorities.

Proposed - Academic Process Improvements

| Item | Description | 2016 Work plan |
|---|--|---|
| Training: How to submit the ideal academic ticket | HR will present guidelines/tips on what is necessary for each academic ticket type |  |
| Training: Postdoc 101 | Basics of postdoc appointment types, compensation, benefits, etc. |  |
| Training: Faculty compensation | Review of faculty salary components |  |
| Training: Overview of visas | Overview of visa types sponsored by the University |  |
| Training: Advance – CV's | VPAA will be rolling out changes/improvements to the CV in advance |  |
| Training: Academic recruitment | Review of changes to academic recruitments due to new OFCCP guidelines |  |
| SRS return to department enhancement | Add drop down menu of reason types for ticket returns |  |
| Turnaround and timing document | Guidelines of timing for academic actions |  |

Proposed Next Steps – HRAB Approvals

1. Services commitment recommendations from the sub-committees
2. Proceeded with 2016 work plan items
 - Continue to evaluate premium recruitment (staff) options and conduct a deeper needs assessment.
3. Add new turnaround targets to the SPA document in January 2016
 - Results reporting for new metrics to be developed in 2016
4. Update and communicate SPA in January of 2016

Questions?