REPORT ON

RECRUITMENT PROCESS AND PRACTICES AT THE UNIVERSITY OF OREGON

Harvey Blustain
Eugene, OR

June, 2018

At the request of the Vice President for Finance & Administration, I assessed the employee recruitment process at the University of Oregon with the goal of identifying improvements in process and practice. During April and May, I reviewed documentation and interviewed individually or in small groups 55 people in central HR and the units.

This report is divided into seven sections:

A. General observations
B. Strategic questions
C. The recruitment process
D. HR partners
E. The MyTrack application
F. Support
G. Pools, faculty and research

Attachment A lists all of the people interviewed.
Attachment B aggregates the recommendations embedded in the report.
Attachment C consists of HR-generated process maps for the current recruitment process.

A. General Observations

1. This consulting engagement was prompted by concerns within Human Resources about the effectiveness of the recruiting process, concerns that were verified by the results of a Fall, 2017 user survey of Finance and Administration services. The survey revealed dissatisfaction with the recruitment process, which people across the University found to be slow, transactional, lacking in customer service, and disempowering. The discontent was caused in large part by the MyTrack implementation and the imposition of a centralized process.
    - My interviews confirmed the dissatisfaction. The recruiting process takes too long, requires too many approvals, and is often delayed in Human Resources.

    - Typical comments included: "time-consuming," "too many touchpoints," "feels mired down in transactional stuff," and "frustrating." "We need to nag to get things done."
    - HR partners perceive that the lack of clear rules, combined with risk avoidance, leads to arbitrary decisions. People in central HR, I was told, are presented with an issue and react "like it's the first time it ever happened." "Everything feels like a one-off."

2. The recruitment process is a work in progress. Only a few years ago, two separate HR organizations were merged. MyTrack was introduced campus-wide in 2016. From a paper-based process with much local variation, recruitment became centralized and uniform. With just one annual recruiting cycle completed under the new regime, the learning curve has been steep and painful.
   - Overall, there is a sense within both the University Talent Acquisition (UTA) and partner communities that things are getting better. Users are less frustrated than a year ago. The process is smoother and responses are faster. The HR Service Center used to get 15 to 20 calls a week from a hiring manager needing help. Those numbers have gone down because, according to the Center Manager, "people are starting to catch on."
   - UTA has worked to improve the process. The addition of a person to triage incoming position descriptions (PD) has helped. Recruiters have been given more responsibility for compensation and classification analysis. Other initiatives are underway that should decrease the process and human friction between central HR and the units:
     - Regional hubs, currently being designed, will place more authority in the hands of the units.
     - Generic position descriptions for faculty and research will launch the process more quickly.
   - When situations evolve quickly, there can be a lag in people's perceptions. They remember a bad experience and it takes a while for better memories to take hold. Something like that seems to be happening with recruitment.

3. Staffing levels should be increased, but more people alone will not address the inefficiencies.
   - The staff in Talent Acquisition got high marks for their professionalism, attitude, and "calm under fire." But they are also "overwhelmed" and "overworked." A senior person in Academic Affairs reflected that she now gets more emails from HR on weekends, which tells her "they are in chronic overwork stage."
     - In addition to recruitment, the staff also spends much of their time on personnel actions, e.g., expansion of duties and reclassification, that are still paper-based.
   - Additional staffing is needed, with priority in the following areas:

    - An HR Generalist is needed in Compensation and Classification (C&C) to assist the Senior Compensation Analyst. There have been two failed searches for this position.
    - The Interim Compensation and Operations Assistant should be made a permanent position.
    - A part-time Project Manager should be appointed to oversee the implementation of the regional hubs.
- The regional hub model should, over time, reduce the workload in central HR, freeing some of these people's time for more value-adding consultative services.
- Additional staff will help in the short term, but sufficient progress will not be made by throwing resources at the problem and letting the kinks work themselves out. UTA has made progress, but more can be done. Attachment B offers an agenda for systematic advancements.

4. Evaluating recruitment was made difficult by the lack of metrics and data. Talent Acquisition has started to pull information from MyTrack on the volume and timeliness of PD and requisition approvals. Metrics on reclassifications are tracked because of a 60-day limit imposed by the SEIU CBA.
    - But neither HR Operations nor Payroll tracks the timeliness of their output. The Provost's Office has no data on the time to fill faculty positions. People in the units gave estimates that varied, often by weeks, of how long they wait for central HR to do something. There are no data on the numbers of or reasons for failed searches. The HR Service Center fields up to a thousand calls a week on all sorts of issues but does not log or categorize them. Cognos offers no reports related to recruitment as the data are not available there.
    - As a result, most of the evidence provided here is qualitative, based on people's experiences and perceptions. In an evolving environment, where people's views are often informed by their last encounter with HR, interpreting the range of opinions was challenging. But there was enough consistency in what I heard to have confidence in the findings and recommendations.

B. Strategic Questions

Two strategic questions underlie the quest for process efficiencies:

- What is UO's philosophy and model for recruitment?
- Where does UO stand on the trade-off between risk and efficiency?

1. UO needs to articulate the principles that will guide recruitment going forward.

A. The 2014 Aon report created an expectation that units with their own recruiters would manage the process within parameters set by HR. The report suggested that "Recruiters will now be playing a consultative rather than transactional role" and will need "to determine which departments will use Department Recruiters and which will use HR Recruiters based on department skills, knowledge and available resources." Although the documentation I saw included no discussion of principles, the model implicitly empowered the units.

- While some units may have interpreted the Aon report as supporting more decentralization, that was not central administration's intent. The ambiguity over what was intended in 2014 reinforces the need for to make explicit the underlying goals and principles behind the transition to regional hubs (see section D.3)

B. With new leadership and staff, HR went in another direction. The MyTrack implementation imposed a regime of centralized uniformity. Central HR took control and "locked it down tight," resulting in "zero empowerment."

- Although never articulated, the principle now governing recruitment is central control. To use partners' terms, "HR makes everything a checkbox" and "Every transaction is an audit." Much of the HR partners' dissatisfaction stems from this reversal of their expectations, the heavy oversight of UTA, and the sense of being held hostage by delays in central HR.

C. The implementation of the regional hubs will be a significant redesign of recruitment and will once again change the distribution of roles and authority. Human Resources needs to clearly articulate the principles underlying this change in process, roles and functions. The hubs must explicitly and in practice empower users in the units or they will perceived by the units as a failure.

2. Senior administration needs to communicate its position on risk.

A. There is a trade-off between doing work quickly and avoiding risk. The less time checking PDs and offer letters, the greater the chance of something falling through the cracks.

- Many of my interviews in central HR led to a variation of questions such as: Are we supposed to be fast or to manage risk? If the emphasis is speed, what can we care less about? What risks are we managing for? If you can't have a fast process and no risk at the same time, then what are the must-haves?
    - Lacking institutional answers to those questions, the default position has been to play it safe, with all the resulting scrutiny and delays.
- UO is currently managing the trade-off by telling people to work harder and faster while continuing to be risk-averse. This is unsustainable, even with the addition of interim personnel.

B. Risks come in a variety of types and severity. What are the risks involved in recruiting?

- Based on interviewee responses, the greatest risks are:

- Misclassification of classified or OA status.
  - Misclassification of FLSA.
  - Failure to comply with the collective bargaining agreement regarding (for example) raises.
  - Failure to observe veteran's preference.
- A scattershot of other risks were identified as well:
  - A mistake in estimating physical tasks, e.g., requiring an office worker to lift 100 pounds.
  - Inappropriate minimal qualifications leading to recruitment at an unnecessarily high rank.
  - Failure to identify the fine line between an advisor being faculty versus OA.
  - People being paid too much compared with peers.
- One person, discussing how a single individual in MyTrack can do all approvals at the PD stage, expressed fears of an "inside job," although on further questioning she didn't know what that meant either.
- People in the units repeatedly highlighted the greatest risk for them: losing a great candidate when recruitment is delayed for weeks because UTA is "checking the boxes."

C. All risks are not created equal, and some can be overlooked, downgraded, or mitigated. Giving more classification responsibility to recruiters, for example, slightly elevated the risk of misclassification but it has proved successful with little additional jeopardy. To save time, HR Operations has stopped comparing the offer card with the PD; I heard of no problems as a result of that change.
   - Senior administration needs to identify the various risks, determine which ones are acceptable at what level, and inform the community so that everyone can work toward the same goal.
   - This ties back to the first question around organizational philosophy and empowerment. Is UTA a compliance unit or service unit? How is responsibility for managing risk to be distributed around campus? The implementation of the regional hubs will certainly raise these questions, and senior leadership needs to frame the discussion.

C. The Recruitment Process

1. Position description (PD) development and approval is the first step in the recruitment process – and it is not an easy start.

A. The recruitment process begins when a hiring manager, having identified a staffing need, creates or revises a position description. The PD specifies what work needs to get done, the type of person who should do it, and all the organizational details surrounding the job. If it is a new position, fleshing out a PD – the job, position summary, salary recommendation, department and budget information, proposed classification, and an organizational chart – can take several weeks in the unit.

- Once developed, the PD gets entered into MyTrack, where it goes through at least two local layers of approval: the HR administrator and the unit director. Because MyTrack does not require specific approval roles and there is no pick or validation table, approval can be done by anyone, such as the HR administrator, playing all approval roles.

B. Once the PD is approved at the unit level, MyTrack sends it to the recruitment team in UTA, where an HR Assistant applies triage to the incoming PDs: Is it complete? Are there noticeable errors? This initial screening has helped speed up the process.
   - Estimates vary on how many of the 1,200 to 1,500 PDs created each year need to be reworked and revised. One recruiter estimated that one quarter of the PDs coming in are not ready for evaluation because (for example) the position summary does not make sense or the duties are not aligned with the required qualifications.
   - Data compiled for Q1 2018 confirmed that 25% of the 303 PDs submitted needed follow-up in the triage stage or from the recruiter. This is lower than the two-thirds estimated by the Senior Recruiter, who was reflecting back on her experience over the past year.
     - People in the units are becoming more adept at creating PDs and the amount of rework should continue to decrease. As older PDs are extracted from file cabinets, updated, and put into MyTrack, the library of model PDs will grow, further routinizing this part of the process.

C. The PD is then assigned to a recruiter who also checks for completeness, selects additional background checks, reviews for alignment of duties and minimal qualifications, applies affirmative action and standard occupational coding, and assesses readiness for posting. The coding of the job as classified or OA is viewed as the most risk-laden of all the actions. Recruiters recently were given the authority to determine if the PD can bypass class and comp, another significant time saver.
   - There are currently four recruiters of various levels (including an interim assistant) in the unit. PDs are assigned to recruiters based on the type of position: classified, OA or faculty.
     - Recruiters also help with other HR functions, such as expansion of duties or reclassification, and that takes up much of their time.
   - MyTrack tells the unit partner on whose desk in Talent Acquisition the PD has landed. In addition to calling that person, the hiring manager or partner may also call someone else he or she knows, In either case, the partner’s call is often sent to voicemail, causing more frustration.

    - UTA should communicate to HR partners which recruiter is responsible for what type of employee. That recruiter should then be the case manager for that recruitment as it works its way through the system.

D. From the recruiters, the PD is passed to Compensation, which checks for job content analysis, FLSA status, SEIU classification or OA comp band, and proposed compensation range. Some partners said that they experience yet another round of the same questions they got from the recruiter.
   - The office is staffed by a Senior Compensation Analyst who, in addition to recruitment, is involved in reclassification, expansion of duties, and other personnel actions. The HR Generalist position reporting to her is vacant after two failed searches, so she is essentially a one-person unit and stretched thin.

E. It is in Classification and Compensation (C&C) that most of the negotiation between central HR and the units seems to occur. Is the position truly OA or classified? What compensation range is reasonable?
   - Compensation was identified as a major bottleneck. To improve the flow, recruiters were given the authority to bypass Class and Comp, involving the Senior Compensation Analyst only if there is an issue. The recruiters also started doing the initial compensation review. Compensation work for pooled faculty and research positions has been pushed out to others in UTA.
     - These steps have helped to ease the load on the Senior Compensation Analyst. The amount of time a PD spends on her desk has self-reportedly been reduced from five days to one day.
   - C&C analysis is viewed by partners as arbitrary.
     - One manager, example, submitted a PD for an assistant director position. Copying an existing PD, he made a few changes, including a change in reporting relationship. Although the job duties were the same, Compensation lowered the band, reportedly because the new reporting manager was lower in the organization than the previous one.
     - Another said, "I copied and pasted a PD, got questioned on one verb and was told it was a lower classification."
     - And another manager who had copied and pasted a PD with minor changes also saw the job reclassified: "It is not clear what criteria they are using."
   - C&C was cited most often as the area where HR partners want more authority.
     - One person spoke for many when she said, "If I have done this before, why are we arguing about whether this is OS 1 or 2?"
     - Another gave the example of being unable to offer an OA candidate a higher salary than advertised, even though it was within the band: "If we have our manager's approval, why can't we make the offer?"

- Compensation structure is beyond my consulting scope and expertise, so I only note here that many people would like to see the broader problem addressed through the creation of a job family-based compensation structure.

F. Data pulled from MyTrack suggest that the delays in PD approval in UTA may indeed be getting better.

Period	Number of PDs Approved	Average Calendar Days for Full Approval
October, 2016 – September, 2017	792	14.28
October 1, 2017 – December 31, 2017	271	15.31
January 1, 2018 – March 31, 2018	281	11.47

G. Not all positions are brand new, and a hot button issue for HR partners was the treatment of revised PDs. The need to review PDs arises as incumbents leave, there is a reorganization, or technology changes the nature of jobs. But all position descriptions – whether they are to be occupied by new or current employees, and even if they are essentially the same as they were before – must be reviewed by central HR to ensure that the job duties, classification, compensation, and other variables are correct.
- Reviewing all PDs takes time. HR partners were hopeful that PDs with minor changes could get approved faster, but experience has taught them not to count on it. Sometimes a slightly revised PD gets hung up in classification, at other times the issue is compensation. Again, to many the determination felt arbitrary, and could mean, said one manager, the difference between a one-week and a four-week process.
- Most HR partners recommended that PDs with only minor changes should be given a pass or only cursory review. That, of course, raises the question of what is a substantial versus a minor change.
  - People used various criteria to define minor changes: no changes in the nature of the job itself; the description of the department; the department name; small changes in numbers of people supervised; change in reporting relationships; and a shift in work of the same nature (e.g., reassigning a custodian). HR partner estimated that 60 to 80 percent of submitted PDs involve "minimal" changes.
  - UTA's position is that apparently small changes may not in fact be small, and that not doing due diligence puts the University at risk.
  - Significantly, the Regional Hub Framework proposes that the regional hub "will now have final PD approval authority for non-material adjustments." Minor or non-material: at some point UTA will need to define exactly what that means.

H. People can currently see PDs within their organization, but HR partners want to see PDs from across the University. An undergraduate coordinator in Physics may have different duties than an undergraduate coordinator in Music, they argue, but at its core an undergraduate coordinator is still an undergraduate coordinator.
   - They were also largely dismissive of the arguments made against opening up access: that the array of PDs for large job families would be overwhelming (they wouldn't have to read all of them), that access to salary information would reveal inequities across the institution (they already know that), and that being able to copy-and-paste would reduce having to think critically about the needs of one's own unit (to the contrary, they argued, it could spark new thoughts about the job).
   - If feasible within MyTrack, PDs from across campus should be accessible to all. Of greater value would be for central HR to create a library of PD templates and guidelines for the most common positions.

I. Some partners argued that efficiencies and speed can be achieved by posting the job and starting the search before a PD is fully approved. There is precedent for this in high-profile cases, such as a football coach needing an offer letter immediately. In these cases, HR creates a requisition and hands it to the unit.
   - This approach would be difficult to achieve on a large scale since it assumes that people will get around to finishing the PD and that there are no major issues (e.g., classification, salary band) to be hashed out *ex post facto*. A finished PD should remain a checkpoint for moving the process forward.

2. The job requisition process is straightforward and imposes no major barriers.

A. When the PD is approved, the HR Operations team enters the position in Banner and assigns the position number. The position number is important because at the time of hire it ties the position with the person to create a unique job identifier. The position number also enables coding from the PD to be preloaded into the offer and the Banner job.
   - Because of how MyTrack works, the creation of the position number is needed to approve the PD, i.e., the requisition cannot be issued until the position number is created. There is, however, no other logical reason why this number needs to be on the critical path; it can be created later.
   - According to metrics pulled from MyTrack, the PD spends an average of two days in HR Operations before the position number is entered. UTA and HR Ops have discussed and been working on the process adjustments to remove this step from the approval process. If this step were removed, and if MyTrack allows it, that's two days out of the process.

B. Once the position description is approved, the hiring manager launches the requisition in MyTrack. Information on the requisition is rolled over from the PD and is not editable by the units. This is a point of contention, with the units dismayed that they can't make simple changes. Central HR maintains that no changes are simple and even editing the name of the supervisor can have implications. But the units do add new information that does not alter the job materially, such as advertising dates and advertised salary range.

- The requisition is approved by the unit HR administrator, the unit budgetary authority, the Associate Dean (in CAS only), and then the Vice President or Dean or proxy.
- I understand the reason for approval at each level, but three or four layers seem excessive, especially since the PD has already had two layers of approval. Perhaps several of those administrators would be satisfied with just notification.

C. Central HR works with the hiring unit on supplemental questions (SQ) for applicants. The SQ is an attachment, rather than an integral part of the application, so the process is burdensome for some applicants. If an applicant does not attach the SQ, he or she has to withdraw the application and then reapply with the attachment. The turn-in rate for applications with completed SQ has reportedly been around 50% for some units.

- The Health Center is piloting a project in which SQs are embedded in the application. This has resulted in a higher application submission rate and has also made it easier for application reviewers, who no longer waste time handling attachments. The Health Center claims that it has helped them to get to a narrow list of candidates more quickly. If truly successful, this pilot should be disseminated more widely.

D. The recruiter in central HR, typically the same one who handled the PD, approves the requisition. She also reviews the position announcement and ad, and then sets up and posts the ad on the UOCareers, the Register-Guard, the Chronicle of Higher Education, and GO HERC. Units will also post ads where their intended audience can see them.

E. I heard little to suggest that this part of the process was a problem. HR generally turns the requisition around in one or two days.

3. The interview and selection phase is largely out of the hands of central HR.

A. Talent Acquisition has multi-colored process maps (Attachment C) for all phases of recruitment but not for the actual work of candidate evaluation and selection. This is because units appoint the search committees, set the recruitment strategy and manage this phase with little involvement from UTA.

- Units use their own methods, tools and shadow systems for evaluating candidates. Many of these are functional relics from the old days. Some committees rank candidates numerically, others are qualitative. Some use a point system, others don't. Practices for applying required 5% or 10% preference for veterans vary widely.

- The speed and effectiveness of this phase depend on local conditions, and some of the academic administrators conceded that their committees are sometimes slow.
- This is an area where HR partners, especially those involved in academic or OA searches, want more training, guidance, and tools.

B. MyTrack does not adequately support this phase of the process. For example, it does not enable candidate rating and can only evaluate people based on what is in the PD. Only the search administrator can see feedback on all the candidates, limiting MyTrack's usefulness as a means of sharing work.
   - Applications come in through the MyTrack applicant portal. Applicants for faculty positions often come through Academic Jobs Online, which is also used to evaluate candidates. AJO is not integrated with MyTrack. Faculty jobs can get hundreds of applicants, so the lack of integration is a source of irritation but there are apparently workarounds.

C. Once the pool of candidates is winnowed down, what happens next depends on the job classification.
   - If the position is *classified*, the search committee uploads via MyTrack a spreadsheet of ranked candidates it wants to interview. HR reviews the minimum qualifications and salary and ensures that veteran preference requirements are being met.
   - If the position is for an *OA or faculty,* UTA's approval is not needed to proceed with the interviews.

D. The chosen applicant is made a contingent offer. Any negotiation with the candidate for a classified position needs to involve HR.
   - When the candidate accepts, he/she is taken to MyTrack's new employee information form to enter date of birth, social security number, and address.

4. The back end of the process – from issuing the final offer card to onboarding – causes further delays. Or maybe not.

A. When the contingent offer is accepted, the hiring unit notifies the other applicants, uploads the search documentation and completes an offer card. Much of the information on the card comes over from the requisition, with the unit filling in details such as start date, reporting manager, annual appraisal date, and salary.
   - I heard several times that "the instructions for the offer card are vague" and "awful" and that "the language is not accessible." Someone from UTA who walked me through the application admitted that it was confusing. The instructions should be reviewed to ensure that they are useful to users and not the cause of mistakes and rework.

B. On receiving the offer card, central HR emails the candidate for a background check authorization. Degree verification is also done if appropriate.
   - Background checks used to be a drag on the process, but a new vendor has reduced the time considerably. As a system enhancement, several HR partners wanted to be informed automatically when the background check is completed; currently this is limited to a single contact.
   - The background check done, central HR reviews the final offer card for salary, minimum qualifications, and veteran status. If all is okay, an official offer is emailed to the finalist.

C. Getting the final offer card in the hands of the applicant is arguably the most critical turnaround time. Delays in getting the letter out creates numerous problems:
   - It leaves a bad impression in the mind of the new hire (a point made repeatedly throughout the interviews). At a minimum, the University needs to provide applicants with clear expectations on the process.
   - It is hard for the unit to set a start date when it is not known when HR will send out the offer. This is made more difficult since units themselves can't change the start date in the system.
   - Departments can't make announcements of new hires.
   - Lack of an offer letter in hand can make it hard for people new to Eugene to rent an apartment. A delay is especially problematic for researchers coming from other countries.
   - Grant-funded positions are time-sensitive and delays complicate the expectations of funding agencies.
   - New hires need to give notice to their current employers, and classified employees especially are reluctant to do that without a firm offer in hand.

D. Many of the partners claimed that the time to get the offer letter has been a major source of frustration. UTA says the problem has been largely addressed and the situation has improved.
   - HR partners said that it can take three weeks or more to get out an offer letter. UTA concedes that there was a three-to-four-month period of excessive delays but that the institution of better practices (such as streamlining PDs for pro tem faculty) and the return of someone from maternity leave have brought the offer letter turnaround time closer to its six-business-day goal. As people in the units have more current (and better) experiences, UTA argues, the frustration levels will drop.
      - It is hard to assess the competing claims. There are no hard data on time required to issue the offer letter, although there are plans to extract such metrics in the future.
   - Despite the likely improvement, there are still potential causes for delay:

    - While domestic background checks are going faster, international checks can take several weeks.
    - Each unit has developed its own letter, so when uploading the offer letter UTA has to choose from among over 40 templates. The work would go faster if there was one letter for each employee type (OA, classified, faculty).

E. The HR Operations group reviews the offer information for export to Payroll. It used to be that people in Operations compared the information on the offer card and the PD. If there was a discrepancy, consultation between Ops, UTA, and the hiring unit caused further delays. With a decrease in errors, this check is no longer done.
    - Still, with up to 20 offers received in a day, the process can be slow. The addition of a temporary person has helped.

F. When a candidate accepts the final offer through the applicant portal, he or she is then asked to complete new hire starter forms (e.g., W-4 and I-9). This also provides access to the onboarding portal with information and a task list.

G. Payroll receives a daily report of information on new hires. Payroll likes that this job detail export now comes in regularly each morning and not at any time as in the past.
    - With this report, Payroll creates a person record in Banner, generates a 95#, enters the 95# into MyTrack, and notifies the unit HR administrator, the hiring manager, and the unit payroll administrator of the 95#, along with instructions on requesting a temporary Personal Access Code (PAC, which is provided by the HR Service Center). The new hire uses that PAC to create a DuckID that is effective on the start date.
    - Once the new hire completes the W-4 and I-9 (and per current practice he/she can't get paid without them being submitted), the job record in Banner is completed and the employee is added to payroll.

H. Without a 95#, an employee cannot get the DuckID that enables access to campus systems. As with the offer card turnaround, I heard competing narratives of how quickly the process did or did not move.
    - During the interviews, I heard many stories of people who sat at their desks for a few days with nothing to do because they lacked a DuckID. Pro tem faculty were unable to set up their course materials in Canvas. A new hire in research reportedly had to cancel animal lab training for lack of a DuckID.
    - Much of the users' dissatisfaction was directed at Payroll and the laborious process needed to create a 95#.
        - Typical comments included: "They have stacks of paper and they wait to see who calls to complain." "We do our work ahead of time, but Payroll gets it to you

when it is due tomorrow." "There appears to be no triage system." "They don't answer their phone."
    - An individual can have only one 95#, which becomes an issue if the applicant had been a student or a previous UO employee. Payroll tries to prevent this by manually creating 95#s.
    - Payroll was also criticized for being risk-averse, spending too much time double-checking information (e.g., Is the person being overpaid? Is there a duplicate number for one person?). People claimed that Payroll also will not enter someone in Banner until the I-9 and W-4 have been received, thereby slowing down the process.
- Payroll tells a very different story: that processing a 95# is done immediately and takes (including checking for duplicates) at most half an hour. Payroll does an estimated 10 to 20 95#s a week, although during the fall rush there can be 10 to 20 a day. Even then, with three people able to process things in MyTrack, Payroll claims that it has no problem keeping up.
    - The problem, from Payroll's perspective, has been the delay in getting the offer letter out. To users anxious to get a DuckID, this can seem like a hold-up in Payroll. MyTrack does not send units a copy of the formal offer letter and it does not give users visibility into what is happening in Payroll. This back end of the process is therefore opaque to the unit partners.
- As with the offer cards, in the absence of metrics it is hard to know the true story, the ongoing severity of the problem, or whether it is getting better.

I. Even accepting Payroll's version, one must ask why the 95# needs to be issued by Payroll at all. The third chart in Attachment C (the OA & Classified Offer and New Hire Setup Process) suggests that there are alternatives that might speed the issuance of the DuckID:

- Rather than exporting the job detail to Payroll, the creation of the 95# and associated tasks could remain in HR Operations. The HR Service Center already resets the PAC and one can envision the Service Center, HR Ops, or some combination of the two performing these tasks. HR previously had this responsibility in a trial run but reportedly lost it when too many duplicate 95#s were created. There is no reason why, with proper training, HR could not resume this part of the process.
- Alternatively, the regional hubs could take on these tasks. Giving the units responsibility for issuing the 95# would give the units a greater sense of control over getting the DuckID in the hands of new employees.
- Payroll's only necessary function in recruitment is to collect the W-4 and I-9 and to complete the job record. Whether their continuing involvement as creators of the 95# makes sense – or whether this portion of the work can be assigned elsewhere – needs to be determined by careful analysis based on firmer data than I have at hand.

    - Assuming that Payroll is not currently a major bottleneck, consideration of these alternative allocations of work is not a critical issue. But as the regional hub concept is fleshed out, the allocation of the 95# and the associated tasks should be put on the table.

D. HR Partners

1. ***Much of the recruitment work across the University is done by scores of unit HR partners with a range of experience and expertise.***

A. There are an estimated 200 administrative personnel around campus (i.e., outside of central HR) who are in some way and at various times involved in the recruitment process. Some are HR professionals certified by the Society for Human Resource Management. Others are administrative assistants who work on one or two hires a year. Some enter payroll data, others are associate deans. There is no consistent model for what an HR partner does and needs to know.
   - Currently, all HR partners are treated equally in their access to MyTrack and their degree of authority. Some are clearly more qualified to take on greater responsibility and accountability.
   - HR should segment unit partners into three or four tiers, from hub superusers to occasional users. Each segment should have its own set of competencies (knowledge and skills), training, and possibly certification.

2. ***There is a low level of trust between central HR and the unit partners.***

A. HR professionals and senior managers in the units feel unempowered and locked in what they variously described as a "parent-child" and "police-gatekeeper" relationship with central HR.
   - Typical comments included:
     - "Changes in HR have made for an adversarial relationship."
     - "Problems are not transactions, but everything is treated as transaction."
     - "The first line of the HR guidelines is 'always say no.'"
     - "It would be great if we were working with a CPA rather than an IRS auditor."
     - "We can do it right. We want to be compliant."
   - There was, I was told, a group of 15 HR people from units who had come together to support each other during the MyTrack implementation. They asked UTA for the ability to make changes and corrections in MyTrack, but were denied, being told that they could not be given the "keys to the kingdom." Feeling "shut down," the group subsequently disbanded.

B. For their part, personnel in central HR expressed reluctance to empower local partners, fearing errors and risk. Several people in central HR said that granting users more MyTrack access would be “giving away the keys to the kingdom.” The frequency with which I heard that term, within both central HR and the units, suggests that it is part of a shared world view.
   - I was told by someone in UTA of a person in a unit who had been granted permission to change a PD. “We gave her a lot of power and the next thing we knew she was running the entire search, it was a disaster, and we had to undo a lot of things she did.” With training, that should not have happened.
   - Central HR’s perception that unit partners should not be empowered derives in part from the partners’ own rational gaming of the system. Several times I heard something along the lines of “If I want an OS1, I’ll ask for an OS2” and “We ask for step 6 when we want step 5 or we get step 4.” What appears to UTA as lack of judgment is in fact a reasonable adaptation to a decision environment that is perceived as inconsistent and arbitrary.

C. With greater clarity from HR about standards and risk, and with adequate training, there is no reason why the more senior and experienced partners can’t take on more of the work. Mistakes will be made, but audits will reveal who can be trusted and who needs ongoing support. Everyone should feel comfortable with a model of “train, trust, and audit.” That principle should inform the development of the regional hubs.

3. The “regional hub” model now being developed is the right way to go.

A. The current shared services model is not configured to solve the recruitment challenge. F&A Shared Services (FASS) provides a central hub for coordinating recruitment across F&A units. FASS does an initial review of the PD and a basic analysis of comp and class – and then passes it through MyTrack to UTA for review and approval. FASS also provides tools and templates.
   - With about 100 new hires a year, and 20 to 25 recruitments going on at any one time, FASS promotes greater uniformity across the F&A division and may provide some economy of scale.
   - But FASS lacks the authority to make decisions, making it another level in the bureaucracy, not a solution for clearing blockages in central HR.
   - As stated or implied throughout this report, the fundamental flaw with the current recruiting model has been the centralization of process and approvals within central HR. Authority and responsibility need to be pushed out. The regional hubs are the means to achieve that. This will require training, ongoing support, performance audits, and accountability.

B. An initiative has begun to create "regional hubs" that will empower HR professionals in the local units.

- Proposed changes include:
  - For changes to existing PDs, the hub will evaluate changes and will have final PD approval authority for non-material adjustments.
  - New PDs for supported units will be launched by the hub. The hub will do the initial analysis on employee classification, FLSA status, compensation, and other coding.
  - The hubs will post their own jobs to the UOCareers web site.
  - The hubs will have the authority to create offer cards based on the contingent offer, perform recruiter-level offer checks, and release the formal offer letter.
- As trust builds between central HR and the hubs, the amount of time that PDs and offer letters spend in UTA should decrease significantly.

C. Planning is underway for a pilot to begin this summer in FASS, with a target of August 15 for FASS to assume its new responsibilities. The Tentative Responsibility Transition Timeline shared with me on May 23 (it is a work in progress) identifies some of the key steps that need to be taken: creation of a Memo of Understanding, definition of technical and HR training requirements, configuration of MyTrack to address the FASS-specific recruitment process, and definition of an audit protocol, among others. Based solely on the document, there are other implementation considerations that should be considered in the planning:

- The timeline appears heavy on the tactical formalities of MOUs, end user agreements, collaborative workspaces, and MyTrack permissions, but short on melding the world views of the two organizations. Unit partners repeatedly emphasized the apparent arbitrariness of UTA decisions. That is because UTA has not clearly stated the standards and guidelines it uses. If the hubs are to do their jobs well, and if trust is to be restored between UTA and its hub partners, they need to develop a common understanding of the principles and rules that will guide recruitment.
  - If UTA is to give more responsibility and system access for recruitment transactions to the hubs, they need to be confident that FASS (or any hub) understands their expectations. If FASS is to do their job responsibly, they need to know what UTA knows and be confident that UTA will not second-guess them in an arbitrary way.
- Sometime before July 15, the HR Systems Analyst and the Senior Recruiter are expected to configure a FASS-specific recruitment process in MyTrack. Nowhere in the document is there mention of a UTA/FASS team jointly having designed that process.
  - In the same vein, pilot metrics, audit protocols, and the annual pilot review plan are scheduled to be developed in September/October. These discussions should take place up front (i.e., now) as part of the design, expectation-setting, and trust-building process. Many of those discussions should include the personnel

who will actually be doing the work, not just more senior people in the organizations.

- There should be a staffing plan for the hub. Assuming an increased workload, is the current FASS staff sufficient?
- It is not clear from the Transition Timeline document who is managing the pilot. Carving out bits of time from other responsibilities to shepherd this process is risky. Given the high stakes, there needs to be a Project Manager who dedicates a significant portion of his/her time to the success of this project.
- There should be a plan to provide ongoing support. The pilot is set to begin mid-August, right before the Fall recruitment rush. Perhaps this period is less busy on the administrative side of the University. But for this and other pilots, staffing reassignments from UTA to FASS – however temporary and ad hoc – should be anticipated to ensure that the work gets done and everyone senses a service improvement.
- A number of other units are being considered for a regional hub – IS, Housing, Research, Student Services and Enrollment Management, the Health Center, the Library, and the schools and colleges. HR should create a tentative rollout schedule that emphasizes the delegation of some authority and that generates partner interest in the regional hubs. Having felt disempowered for the past few years, HR partners around the University should be made to feel that relief is on the way.
    - It is important that one of the academic units be an early adopter.

E. The MyTrack application

A. MyTrack was described as the largest systems project since Banner, yet it was apparently implemented without an underlying philosophy of recruitment or a clear understanding of the process implications.
    - The vendor PageUp had little experience in higher education, and MyTrack itself seems to have been designed for a more centralized corporate environment. Although the Aon report envisioned distributed authority for recruitment, MyTrack yielded the opposite result.
    - There was much about the product and the implementation that was not understood at the outset. For example, several people noted that the failure of MyTrack to handle pooled position numbers seems to have caught central HR by surprise.

B. The full integration between MyTrack and Banner would go a long way to making the process smoother and faster. MyTrack currently *imports* data from Banner, enabling the selection of people who can grant approvals and populate search committees. MyTrack has not been set up to *export* and auto generate the 95# due to concerns of multiple 95#s being generated for the same individual. Merging duplicate 95#s once they are identified, is complex and a time-consuming task. As discussed earlier, manual generation of 95#s may (or may not be) slowing down the process for getting new employees up and running.

- Human Resources, Payroll and IS have been working on the integration from MyTrack to Banner, but making it happen would require consensus around priorities between the three units. More critically, UO needs to be off Banner 8 by the end of 2018 and programing resources are tight.
    - Still, the Director of HR Operations reports that UO is closer to achieving Banner integration than PageUp's other higher education customers.
- MyTrack is also not integrated with Academic Jobs Online, although there are apparent workarounds.

C. MyTrack has functionality issues of greater or lesser magnitude that impede the recruitment process.

- There is one PD template for all employee classes, meaning that someone starting a PD is shown all positions and choices for all types of employees. With no parent-child relationships between fields, someone seeking an assistant professor is given the same choices as someone seeking a groundskeeper. This is frustrating for users. MyTrack needs more data validation tables and the ability to constrict fields by position classes.
- If someone moves to a new position, termination of the old position is not done automatically. Instead, the HR manager has to do a paper form and then it can take a month or two to terminate the position in Banner.
- The PD number is not on the PD itself, but PDs do show the position number, which units typically don't use, causing confusion.
- MyTrack has no mechanism for error or exception reporting. The one exception noted was in the offer process, with a pop-up alert that the salary is more than the band allows.
- There is no versioning of documentation.
- There is no "control Z" feature that allows the user to undo mistakes, e.g., in the dispositioning of a candidate.
- HR Operations wants free-form text for notes to Payroll (e.g., that a classified employee is getting personal leave).
- MyTrack has restrictions on reportable fields.
- All of these issues may seem minor in the scheme of things, but they add complexity, friction and frustration to the process.

D. People want to know where they are in the process at every stage. Seeing the overall process laid out in MyTrack is one of the things users like about the application. But there are times when the application limits this visibility to a limited number of users associated with the transaction. This makes parts of the process seem opaque.

- Unit partners can know that the PD is in Talent Acquisition, but not whose queue it is sitting in.
- Approval queues are visible to the hiring unit up to the point when it is exported to Payroll "and then it goes dark." This prompts calls to HR Operations and/or Payroll.
- The system does not always meet the needs of applicants. For example, when an applicant inadvertently submitted a 'track changes' copy of a document, he was unable to retrieve it. Candidates also can't see a copy of the original job posting since classified jobs are pulled from the site after the deadline has passed.
- Committee members claim that they don't have access to all documentation through MyTrack, resulting in a lot of materials being printed out. UTA says that the functionality is there but that units often do not choose to use it.
- The units do not, but would like to, receive a copy of the final offer letter sent to the applicant.

E. UO can *configure* MyTrack, determining, for example, how the system looks and what information is gathered. But only PageUp, not the University, can *customize* the application. There have been discussions in the past about enhancing the system (including some of the deficiencies outlined above) but progress has been slow.
   - The University is nearing the end of its three-year contract with PageUp and is set for renegotiation. Moving to a new application would be a major disruption and I saw no compelling reason to leave MyTrack. Still, the renewal of the contract could be an opportunity for UO to press for enhancements. Working with unit partners, Central HR should develop its priority improvements to MyTrack and frame a negotiating strategy.

F. Support

1. HR partners say they experience long delays in getting support.

A. Users are frustrated at how difficult it can be to get a response from UTA staff.
   - Partners solve problems by calling the people they know. This is how work is done at UO, and the human contact is especially important in an evolving environment where every situation is believed to be unique and needing individual attention.
     - But the slim staffing and heavy workload mean that many calls go straight to voice mail. Everyone understands the situation and most are sympathetic to UTA staff, but it is still frustrating.
   - The UTA contact web page offers five email addresses for its office. There is overlap between some of these addresses (MyTrack questions, recruiting questions), and some people questioned why they should be the ones to figure out where emails are supposed to go. A different model should be considered where the triage and redirection are done by the HR Service Center.

B. Once-a-month partner meetings provide a forum for disseminating information. Many thought the meetings have been useful, but some of the interviewees in more senior positions found "the lectures" to be unidirectional and non-consultative. They should be redesigned to be more collaborative.

C. The HR Service Center assists not only the units, but employees, applicants, banks, people wondering about parking, and anyone else with an HR-type question. The staff – "generalists with an HR slant" – are helpful for a range of inquiries. Through access to MyTrack, they can answer process-related questions – e.g., where is my application? – but most recruitment-specific questions from the units are forwarded to the appropriate recruiter. The Service Center does not log or track calls coming in, so it is hard to know what the calls are about and how they are triaged.
   - Service Center personnel feel out of the loop, claiming not to be informed of (for example) changes of forms or assignments: "We're the last to know." They would especially like clarity on the recruiters' assignments and back-ups.
   - Two hours a week have been set aside for dedicated call-in hours when staff are guaranteed to be available. Calls are answered by Service Center staff who take information and then forward the call to the appropriate staff member. If that recruiter is not available, someone gets back within 24 hours.
     - Reaction has been mixed. Some said that the call-in sessions are convenient, some said they were "sort of helpful," and others dismissed them as not addressing their need for an immediate answer. And others claimed that the call-in hours make no difference since they still get the same response: "I'll get back to you."
     - In any event, central HR says that few people have used the hotline.
   - The Service Center can do more. They have recently started initiating background checks and password resets. They could, for example, issue 95#s, thereby keeping the full recruitment process within HR. The two service center agents I spoke with agreed that they have the capacity to do more work.

2. Online documentation is comprehensive but not user-friendly.

A. The resources at https://hr.uoregon.edu/recruit are good, but cumbersome and sometimes confusing. The navigation is not intuitive. The information is there, but you have to dig for it.
   - For those seeking help on position descriptions, for example, there are six documents to choose from: guidelines, checklist, user guide, fields references, action table, and approval processes guide. One unit partner said that combining information from three documents usually gets her what she needs to know.

- The site is untidy. For example, the page for finding MyTrack training (https://hr.uoregon.edu/recruitment/mytrack-recruitment-module) links to classes that were offered in 2017. During an interview I was shown the page with the current schedule, but I could not find it later on my own.
- The text at times lacks clarity. People described it as “narrative-heavy” and “technical” and there are times one has to puzzle through it. (See, for example, the discussion of MyTrack user permissions at https://hr.uoregon.edu/recruitment/mytrack-talent-management-system/mytrack-user-roles-permissions).
- Given the effort needed to wade through the documentation, it is not surprising that people just pick up the phone.
- In addition to what is online, UTA sends out notices on new features in MyTrack, updates on problems, and changes in policies.

B. As desirable as it would be, daily duties and other priorities make it unfeasible to assign someone to revamp the online documentation. But future additions and changes should be made with an eye toward ease of navigation and bullet-point/checklist-style simplicity.

3. Human Resources offers a variety of training on the recruitment process and MyTrack.

A. Human Resources provides training on several recruitment-related topics: MyTrack, the recruitment process, PD writing, and position and pay actions.
   - Partners have varying needs. Some need advanced training, others a refresher. One person in central HR estimated only half of the partners spend enough time on recruitment to warrant training. But someone in the research area explained her need for some ongoing training this way: “I do just enough so I can never get proficient.”

B. Attendance at training has been diminishing. At a recent training session, seven people signed up, but only two people (including one from UTA) showed up. This has been interpreted by some as a sign that people have become comfortable with the technology and process, and this is likely true. But others acknowledge that daily pressures make training an expendable activity.
   - There is a demand among users for less technical and more best-practice training in how to conduct an effective search, with a prime audience being search committee chairs.

4. Shadow systems exist across the University, and that is not necessarily a bad thing.

A. The University has only recently centralized the recruiting process, and each unit has retained vestiges of its own way of doing things.

- Search committee methods and tools especially are highly localized and will continue to be so as long as MyTrack inadequately addresses the interview-and-select phase of recruitment.

B. Several of the people I interviewed sent me tools and templates they use in their units.
   - The University Health Center maintains an exhaustive five-page bulleted checklist of every step of a classified and OA search. The Center is also developing comparable checklists for temporary and student hires.
   - Shared Services within Finance & Administration have a variety of intake, candidate evaluation, rating summary, and other forms to assist their units. These tools not only support the units, but they create greater consistency in recruitment across F&A.
   - Associate Deans maintain their own list of who is coming on board, and anything that gets sent to HR or Payroll gets tracked. Each of them maintains a spreadsheet of information on salaries for executive assistant positions.
   - Some of these tools and checklists are as good as or better than those of central HR. One of the monthly meetings of the HR partners group could be devoted to units bringing their best home-grown forms and tools for sharing with interested others.

G. FACULTY, RESEARCH AND POOLS

1. Pool recruitments were not anticipated before the MyTrack implementation, and they continue to cause confusion.

A. In pool hires, a general PD is used to cover multiple hires. The underlying idea is that some jobs – pro tem faculty, research support, post-docs – are similar enough that they can be covered by one PD. Hiring from pools reportedly shaves a week or two from the process.
   - Throughout the interviews, I found a lack of clarity – within both central HR and the (especially academic) units – about how pool recruitments are supposed to work.

B. There are a number of pools for tenure-track and pro tem instructional faculty, researchers, and classified staff. Applicants apply to a pool, where their resumes are then available for viewing by hiring managers. In practice, managers (especially in research) know who they want to hire and direct that applicant to the pool.

C. Once a manager selects someone from the pool, i.e., wants to issue a job requisition, a job-specific PD needs to be created. This PD needs to be approved by UTA. Users chafed at having to "restart" the process all over again by having to get approval. Many do not seem to know that the process can go more quickly if the new PD is flagged in MyTrack with the original PD number.

- This is an area where greater clarity is needed on what sorts of changes and additions to the PD will warrant what level of review.
- There is a work group in process finalizing a system whereby instructional pro tem pool hires will no longer require this step. It is anticipated for rollout this summer.

2. The tenure-track and tenured faculty (TTF) recruitment process has been streamlined.

A. The TTF faculty process begins when the OtP, following the tenure-track faculty Institutional Hiring Plan (IHP), creates in MyTrack a requisition for an approved line. Since OtP has developed a generic faculty PD, no job-specific PD is necessary. OtP notifies the department that the requisition is ready.
   - The department completes the requisition to include job ad, recruitment strategy and search committee, then returns it to OtP for final approval.
   - OtP reviews the requisition, including recruitment strategy, and releases it to UTA. UTA prepares the job ad for posting to UOCareers, the Chronicle of Higher Education and GO HERC. If the department is using Academic Jobs Online or MathJobs to accept applications, coordination is needed between the department and HR on the timing of posting to both locations.
     - The College of Arts and Sciences is the primary user of AJO/MathJobs, with approximately 30-40 TTF hires annually.
   - As with other types of hires, HR Operations creates a position number in Banner and enters it into MyTrack to prepare for the hire.

B. The unit then conducts the selection process. Following the approval of the Dean or CAS Divisional Dean, the unit negotiates terms with the candidate and documents them via a term sheet submission process. OtP reviews the term sheet for consistency with the rank and field approved in the IHP and produces the contingent offer letter for the Dean's review and distribution.

C. OtP sends the approved contingent offer letter to HR. UTA completes the offer card in MyTrack, which is then used to generate the formal notice of appointment. The department sends the offer letter to the candidate.
   - Processing faculty offer letters for searches conducted outside of MyTrack requires someone in Talent Acquisition to get the candidate's resume from the department and then create an applicant profile in MyTrack to complete the hire.

D. Interviewees in OtP like the revised process but report that there is still room for improved understanding across the units in how it works.

3. Delays in the process have the greatest impact in the research area.

A. Grants can trigger lots of hiring and often at short notice. Researchers cannot start recruiting until grants are in hand, so when hiring needs arise, they come quickly. Delays in hiring mean delays in getting the research started, which in turn can create problems with the funding agency. As one researcher said, “There is no way to meet our deadlines when the process is so slow.”
   - One person noted the irony of research suffering the most from delays when in fact many of the risks that apply to OA and classified positions – e.g., grievances and inflexibility in job expectations – were “not a problem in the lab world.”

B. UTA is working with the Research office in OtP to develop generic research PD templates that, like their instructional faculty counterparts, eliminate the need for a specific PD to launch the process. The challenge has been to create templates that reflect the range of positions in research, e.g., lab assistant, communications, and databases. Defining the line that separates research from OA positions has also apparently been an ongoing issue.

Attachment A

List of People Interviewed

1. Dorothy Bollman, Grants/Contracts Coordinator, Institute Sustainable Environment (ISE)
2. Miriam Bolton, Assistant Dean, Administration and & Operations, CAS
3. Catherine Bonomini-Smith, Senior HRIS Data Analyst
4. Connie Brady, Connie Brady, Associate Dean for Finance & Administration, Lundquist College of Business
5. Sandee Bybee, HR Engagement/Communications Manager
6. Corrine Cooley, HR Assistant
7. Shelby Cooper, Director, Payroll Services
8. Rebecca Corral, Exec Asst to Deans & Office Manager, Student Life
9. Naomi Crow, Business Operations Manager, Knight Campus for Accelerating Scientific Impact
10. Erica Daley, Associate Dean of Finance & Operations, Law
11. Sierra Dawson, Associate VP Academic Affairs, OtP
12. Alicia De Gonzalez, Divisional Personnel & Budget Specialist-Social Sciences, CAS
13. Marla Dodson, Payroll and HR Manager, Housing
14. Bryan Evans, Human Resources Administrator, Research Finance & Business Administration
15. Jay Ferris, Administrative Director, College of Design
16. Kassy Fisher, Associate VP Campus Services & Chief of Staff (COS), VPFA
17. Judy Gates, Manager, HR Service Center
18. Amy Green, Assistant Dir Human Resources, College of Education
19. Monica Guy, Office Manager, Environmental Studies
20. Jared Haddock, Human Resources Manager, Information Services
21. Brittany Jayne, HR Administrative Assistant, HR Service Center
22. Ben Kane, Payroll Operations Manager
23. Grant Keeney, HRIS Data Analyst
24. Carol Kleinheksel, Office Manager, Humanities
25. Kristin Koozer, Human Resources Manager, University Health Center (UHC)
26. Diane Lachenmeier, Administrative Director, Chemistry and Biochemistry
27. Heather Larson, Lead HR Specialist, HR Service Center
28. Rocco Luiere, Associate Dean for Finance & Administration, College of Design
29. Alex Lundy, Administrative Program Specialist, University Health Center (UHC)
30. Jon Marchetta, Director Finance & Admin Shared Services (FASS)
31. Stacey Marple, Interim Assistant Director Recruit Operations (FASS)/ HR Generalist
32. Ryan McBride, Senior HR Generalist
33. Lauren McHolm, Asst Director Finance & Admin, Research Prevention Sciences Institute
34. Jamie Moffitt, Vice President, Finance and Administration

35. Kim Molinari, Director of Employee Relations, Advancement
36. Patrick Moore, Human Resources Manager, Knight Library
37. Cass Moseley, Senior Associate Vice President Research
38. Nancy Nierath, Director, Talent Acquisition
39. Marie Opsahl, HR Generalist, Talent Acquisition
40. Claire Pascual, Interim Comp and Ops Assistant
41. Kelly Pembleton, Assistant VP & Chief of Staff, Division of Equity and Inclusion
42. Brenda Porter, Executive Asst to Director, Counseling and Testing Center (CTC)
43. Sonia Potter, Director HR Operations
44. Jenna Rakes, Senior Recruiter
45. Nancy Resnick, Chief Human Resources Officer and Associate Vice President
46. Kaia Rogers, Director, Programs and Services
47. Mark Ruckwardt, Asst AD Human Resources, Athletics
48. Haley Ruddell, HR Systems Analyst
49. Anna Shamble, Senior Project Manager, OtP
50. Diana Sobczynski, Senior Compensation Analyst
51. Kathie Stanley, Associate VP & Chief of Staff. Student Life
52. Ray Sykes, Associate Dean for Administration & Finance, Journalism and Communication
53. Roberta Thompson, Recruiting Specialist
54. Adam Unger, Business Manager, Institute of Neuroscience (ION)
55. Donna Winitzky, Assistant Director for Human Resources, Housing

Attachment B

Summary of Recommendations

Strategy and Philosophy

- Conduct an assessment that specifies risks, their management and mitigation. Communicate this assessment to central HR and unit partners as a framework for realigning work and assigning responsibilities. (pages 4-5)
- Frame the philosophy and principles that will guide the evolution of recruitment practices. Declare that UTA intends to train and empower local users to perform responsibly functions that are now done by central HR. Use the regional hub design and pilots to rebuild trust with HR partners. (pages 3-4)

Organization and Staffing.

- Increase staffing levels in UTA. Select people who can pivot to more consultative roles as work is shifted to the regional hubs. (2-3)
    - HR Generalist for Compensation
    - Compensation and Operation Assistant (now interim, to be made permanent)
    - Project Manager (part-time but dedicated) for regional hub implementation
- Move toward a case worker model in which PDs are assigned to a recruiter who guides the unit partner/manager through the entire process. (6)

Process

- Determine what metrics are truly important and incorporate them in ongoing evaluations of the recruitment process. (3)
- If MyTrack allows, take creation of position number off recruitment's critical path. (9)
- Determine if there could be a reduction in the number of approvals at the requisition stage. (9)
- Evaluate the Health Center's pilot project on embedding supplemental questions within the application. If worthwhile, expand the practice across campus. (10)
- Review the instructions on the offer card for clarity. (11)
- Consider reducing the number of offer letter templates. (12)
- Analyze with data the current impact of Payroll's involvement in the creation of the 95# and associated tasks. Consider the staffing and process improvement implications of moving those activities to Human Resources. (14)
- Clarify and make explicit to users the process for pool recruitments. (23)
- Continue to develop generic PDs for instructional and research positions. (23-24)

Partners and Regional Hubs

- Segment the partners into tiers based on expertise and intensity of recruitment activities. Develop for each a set of needed competencies, a training regime and possibly certification. (15)
- For the regional hub pilot in FASS:
    - Foster a collaborative spirit between UTA and FASS through joint establishment of principles, processes, protocols, and metrics. Be sure to include staff who will be actively engaged in the pilot regardless of organizational level. (17)
    - Create a staffing plan that ensures sufficient resources to carry out assigned responsibilities. (17)
    - Assign a Project Manager who will focus on the effort and assume accountability for its success. (17)
    - Prepare a staffing plan to support FASS during the fall rush. (18)
- Identify other potential regional hubs and develop a schedule for full University roll-out. Ensure that an academic unit is among the early participants. (18)

MyTrack

- Continue assessing and progressing on more integration of MyTrack and Banner. (18)
- Assess the costs and benefits of integration between MyTrack and Academic Jobs Online. (11, 19)
- Assess the relative priority of customizations to MyTrack, including the ability to:
    - Inform units automatically when the background check is completed. (11)
    - Create pick and validation tables for the PD that narrow down users' choices to a manageable selection (e.g., classified versus faculty). (5, 18)
    - Automatically terminate the old position when someone moves to a new one. (19)
    - Create versions of documents. (19)
    - Expand exception and error reporting. (19)
    - Enable applicants to see and retrieve the documents they have uploaded. (19)
    - Enable search committee members to see candidate ratings and other documentation. (11, 19)
- Use these and other desired changes in functionality to develop priorities and a negotiating strategy with PageUp in contract renegotiation. (20)

Support and Training

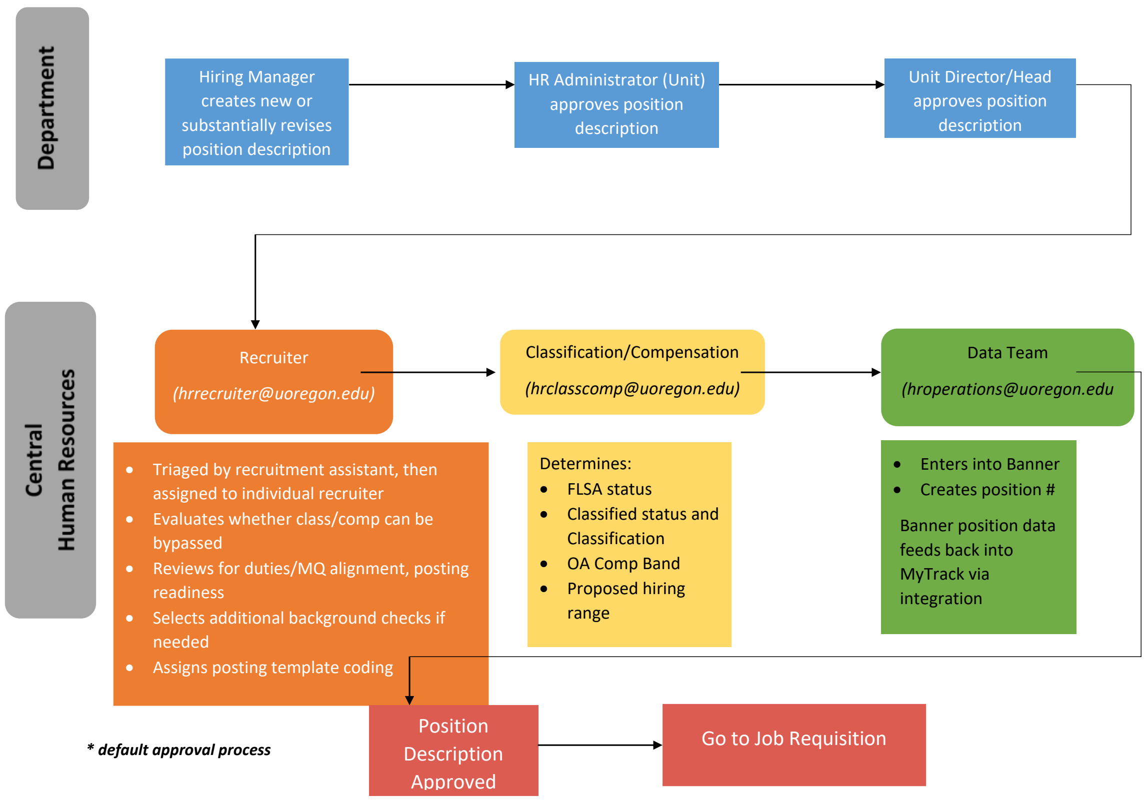
- Open user access to PDs from across the University. (8-9)
- Provide clearer standards on (for example) the threshold for a "minor" PD change, the guidelines for making salary offers, and rules for creating job-specific PDs for pooled positions. (8, 23)
- Develop a library of PD templates and guidelines for the most common positions. (9)

- Continue to provide – and perhaps expand – training and support for search committees on best practices. (10)
- Through the HR partners group, encourage the sharing of tools and templates that units use to evaluate candidates. (10)
- Direct all support emails to the HR Service Center for triage and redirection rather than using five email addresses. (20)
- Rethink the purpose and agendas for HR partner meetings so that they are more collaborative. (20)
- Review the content and navigation of HR's website to ensure consistency and ease of use. Streamline documentation (e.g., the six guides for PDs). (21-22)
- Determine whether the HR Service Center would benefit from a log or tracking mechanism (such as Remedy in IS) for queries that require follow-up or investigation. (21)
- Ensure that HR Service Center personnel are kept in the loop for all communications and changes to assignments. (21)

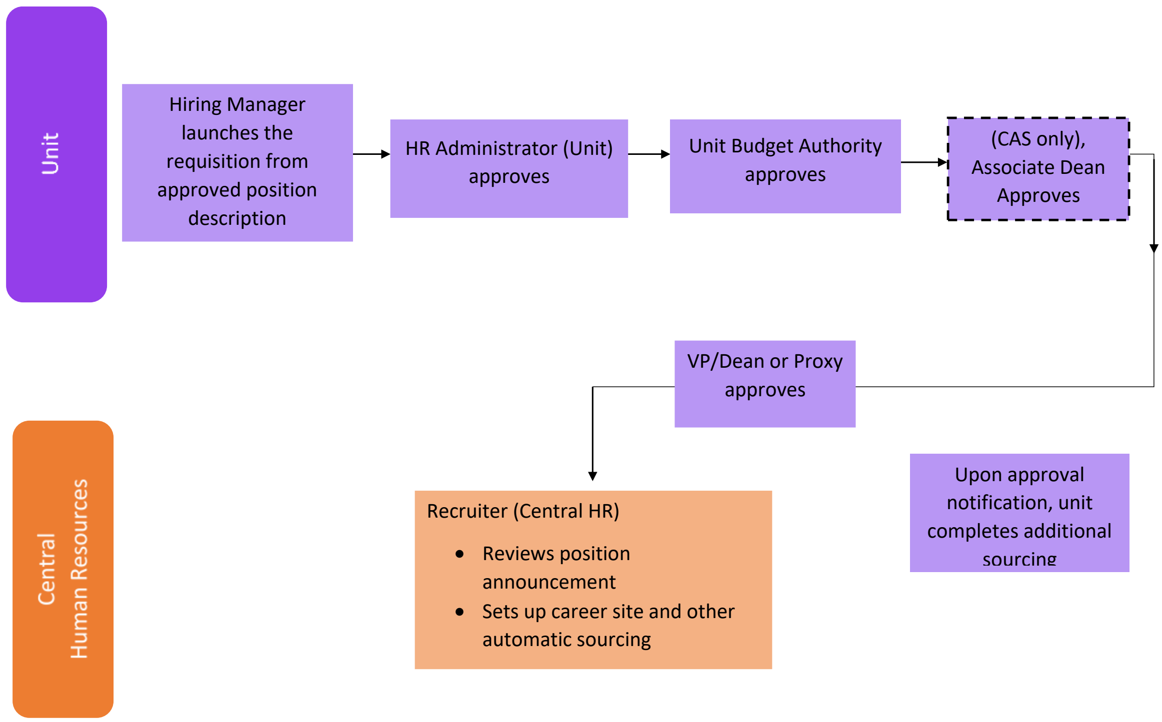
Attachment C

Recruitment Process Flow Charts
(Developed by Talent Acquisition)

MyTrack Position Description Approval/Activity Flow



MyTrack Job Requisition Approval/Activity Flow



OA & Classified Offer and New Hire Setup Process