

Anschutz CSA / ASA HR Community Meeting



- ▶ **Tuesday, June 4, 2024**
- ▶ **from 10:00 to 11:30**
- ▶ **Via Zoom**

AGENDA

Adrienne Howarth-Moore, Associate Vice Chancellor & Chief Human Resources Officer

- **Welcome and Introductions**
- **Chat and Ground Rules**

Adrienne Howarth-Moore, Associate Vice Chancellor & Chief Human Resources Officer

- **Time & Labor Project Update**

Elby Potter, Classification Team Lead, Human Resources

- **Talent Acquisition Update - CIRCA**

Florie Montoya, Assistant VC of Talent Acquisition, Classification, Compensation & HCM

- **FLSA Update**

Wrap Up

Time & Labor Project Update

Adrienne Howarth-Moore
Associate Vice Chancellor & Chief Human Resources Officer

Human Resources





University of Colorado

Boulder | Colorado Springs | Denver | Anschutz Medical Campus

FOUR CAMPUSES UNITED
ALL FOUR: **ONE**

Time and Labor Update

CU Anschutz: HR Community Group
June 4, 2024



University of Colorado

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Time & Labor Update Agenda

- **Project Reset and Phase 1 Complete**
 - **Key Deliverables from Phase 1**
 - **3rd Party Assessment Results**
- **Phase 2 Kick Off**
 - **Phase 2 Governance**
 - **Phase 2 Guiding Principles**
 - **Go-Live Scope Approved**
 - **Phase 2 Draft Project Timeline**
- **Next Steps**
 - **All Campuses**
 - **CU Anschutz**



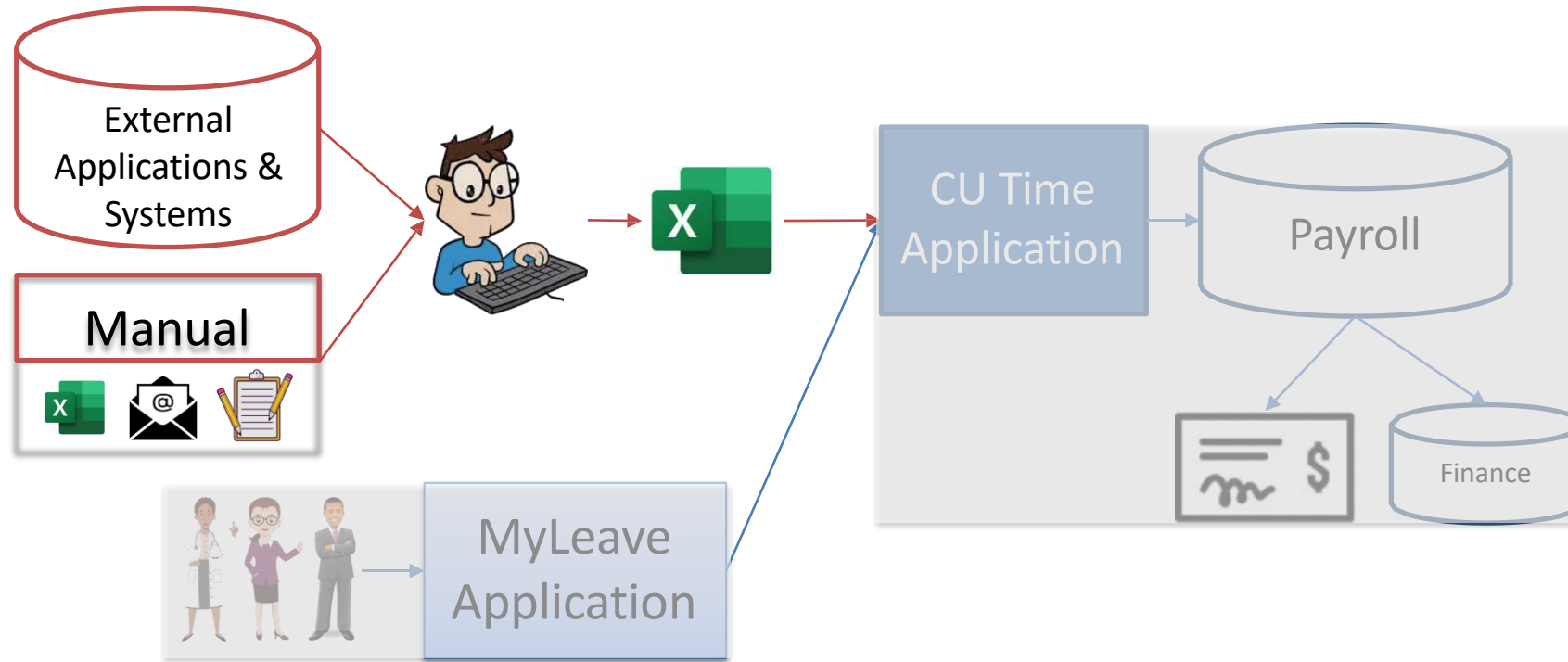
Phase 1: Complete

- Phase 1 was completed in 2023 and consisted of a “current state” timekeeping, leave tracking and payroll practices review and inventory.
- Phase 1 also included a 3rd Party System assessment, including reasons why departments chose a 3rd Party System in lieu of using MyLeave.
- 484 high-level business requirements were identified and documented for future state.
- **PeopleSoft Time & Labor Application was selected to replace MyLeave** and has standard integrations with key 3rd Party Systems currently in use.



Defined: Third Party Systems

“Third Party System” is a catch-all term for any time or payroll entry practice that doesn't originate in MyLeave.



Common 3rd Party Systems Across All Four Campuses

QGenda

- 12 Instances – All at UAMC campus
- Healthcare Call Scheduling Application
- Time/Payroll data is not its primary function or purpose

Kronos

- 7 Instances – 4 at UAMC, 3 at UCB
- Implemented for features not available in MyLeave
- Clock In/Out function is most common reason for use

SubltUp

- 3 instances – 1 at UCB, 2 at UCD
- Adopted for scheduling features, social interaction, clock in/out

Microsoft Teams Shifts

- 4 Instances – 1 at UCB, 2 at UCD and 1 at UCCS
- Punch in/out, scheduling and communication tool
- Punch in/out solution for small departments



Campus Spotlight - Anschutz

| | Systems | Users |
|-------------------------|-----------|-------------|
| Standalone Applications | 33 | 5310 |
| • Kronos – 4 Instances | | |
| • QGenda – 12 Instances | | |
| Manual/Paper Processes | 29 | 2060 |
| Total | 62 | 7370 |

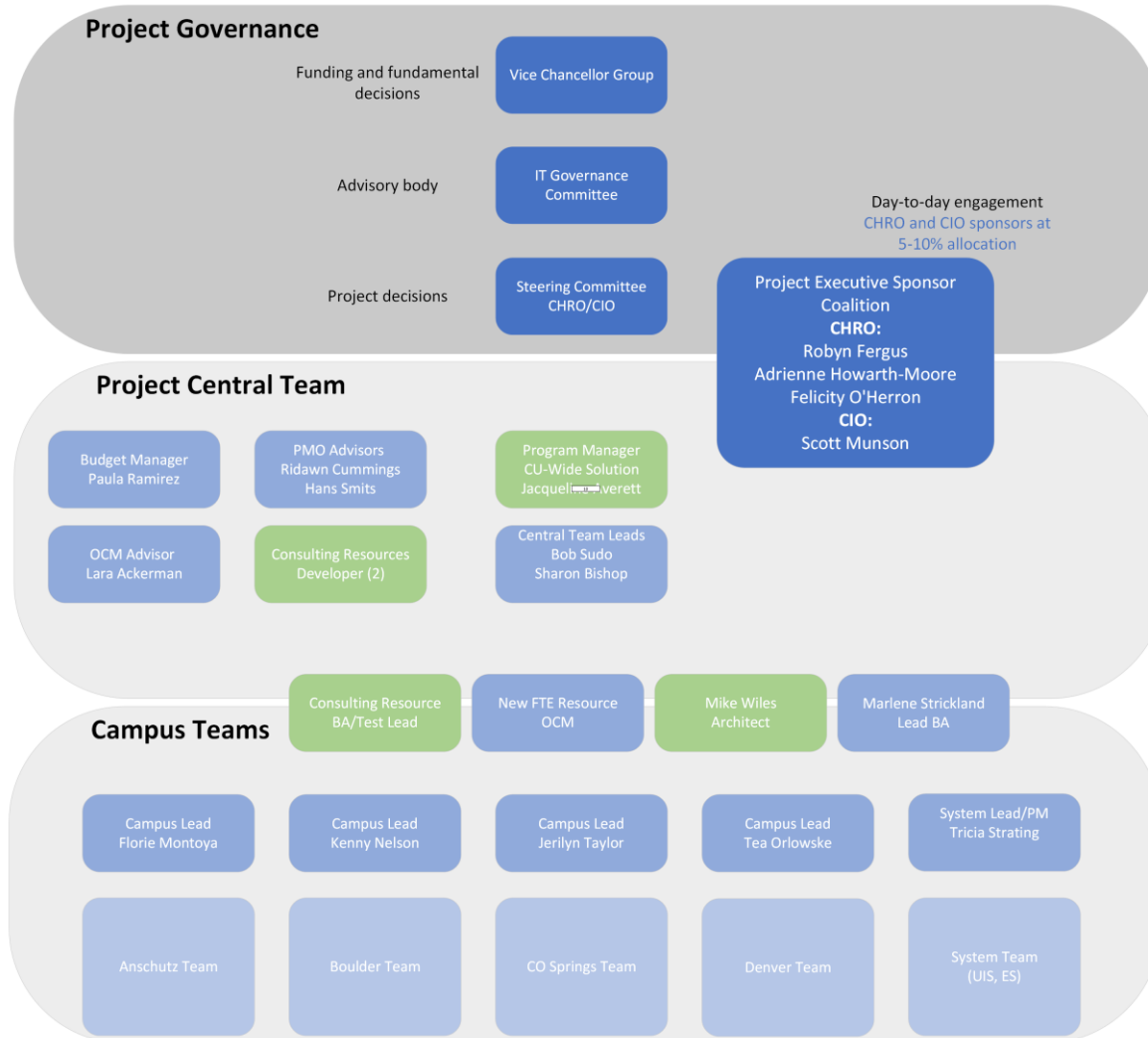


- Primary requirements:
 - Capturing Punch In/Out times
 - Tracking Leave Time – floating holiday, comp time, etc.
 - Crossing Midnight for Shift Workers
- Lowest MyLeave adoption/usage rate among CU campuses
- There is no built integration directly to HCM from any 3rd Party Systems. Data is exported, massaged and manually uploaded to CU Time for each pay cycle.

7-Month Current State Assessment with 100+ Participating SMEs from CU Anschutz



Phase 2 Kick Off: High Level Governance Structure



Phase 2 Kick Off: CU Anschutz Team

Core Team

- Project Sponsor: Florie Montoya
- Project Manager: Lindsey Paterson
- Organization Change Manager: Kelly Hanson
- Business Analyst: India Feaster
- HCM Program Director: Justin Loiselle

Expanded Team

- 100+ Subject Matter Experts (SMEs) from Colleges, Schools, and Units (CSUs)



Project Guiding Principles



Guiding principles help to ensure the project is aligned with the university's goals, aid in decision-making, and provide a framework for project management. They are intended to be referenced throughout the project's lifecycle as they provide clarity and guidance to support successful outcomes.

| Category | Principle |
|--|---|
| Employees are #1 | Employees are our number one asset and should be front and center when we make decisions. |
| Fiscal Responsibility | The project will operate in a fiscally responsible manner, making the best use of our financial resources to accomplish the required outcomes. Decisions will be framed in terms of the wisest way to leverage funding today to lessen further investment later. |
| Project Management Standard | The project will follow the defined IT Governance project management process. <ul style="list-style-type: none"> • The process is aligned to best practices and ensures high-quality results with representation from all campuses. • The IT Gov. Project management process includes formal Organizational Change Management and robust Quality Assurance testing. |
| Technical Roadmap | This project's expected outcomes move CU toward utilizing a cloud-based "Software as a Solution" (SaaS) product in the future; accordingly, we commit to standardizing processes wherever possible. |
| Customization Approach | The future-state solution will make use of delivered functionality and configuration with strategic customizations being limited to those with an approved business case. |
| 3rd Party Tools | Use of 3rd party tools will be limited to those considered mission critical with an approved business case, based on approval of individual campus leadership. <ul style="list-style-type: none"> • Includes ensuring functionality beyond time entry stays in place for Anschutz and Boulder use cases. • Includes assessing opportunities for multi-campus collaboration and solutioning where possible (with supporting multi-campus business case). |
| Useability & Accessibility | User experience, efficiency, and accessibility are important considerations for future-state solution design; the future state solution design will follow CU's documented accessibility standards. <ul style="list-style-type: none"> • Includes ensuring we have a standard for usability and measurement. Expect accessibility will leverage Boulder's Accessibility Lab. |
| Compliance & Security | The university (all campuses and system) will align on payroll rules, policies, regulations, compliance requirements, and security compliance as a key long-term benefit of this project for CU. |
| Process Optimization & Automation | The project will look to drive value and efficiency for our people and our users by replacing current manual processes via optimization and automation where possible. |



April Steering and VCG

“Day 1” Go-Live Scope Approved

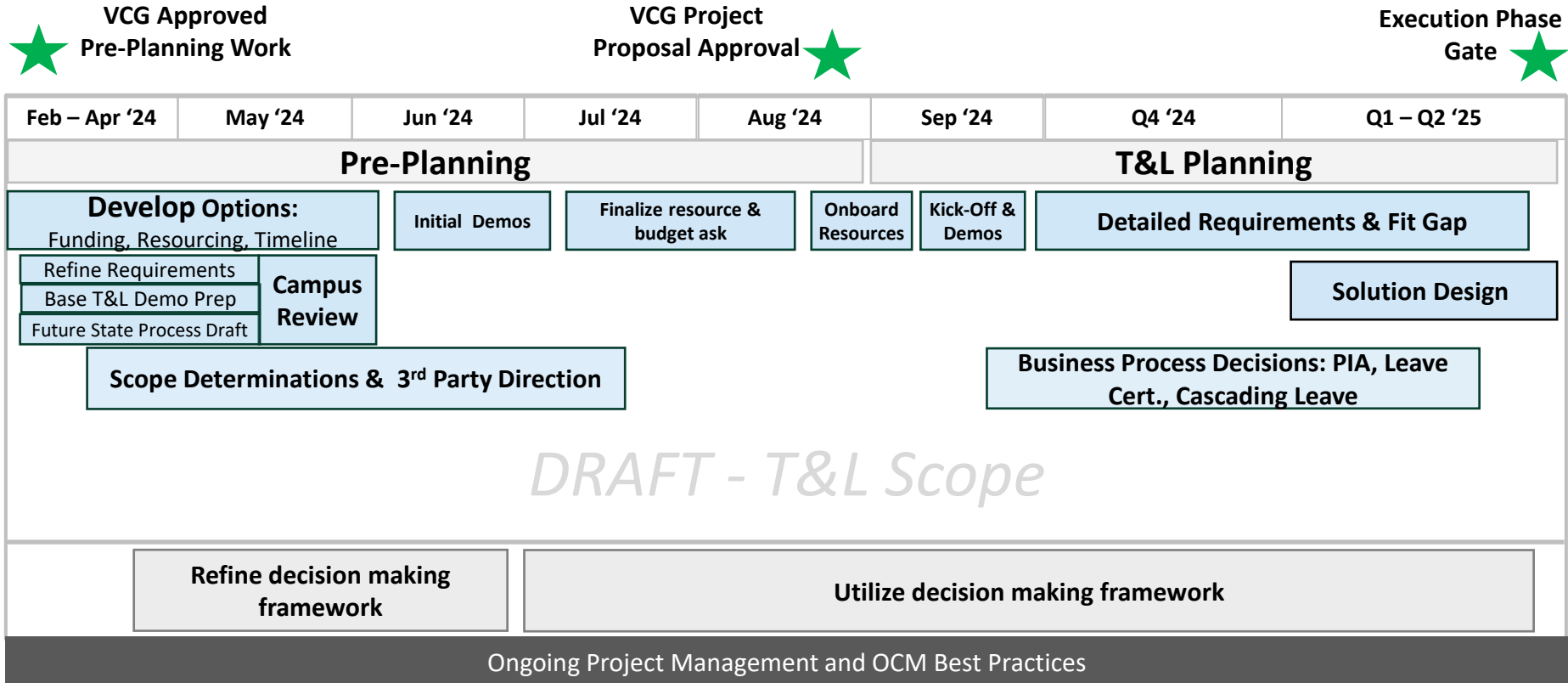
| Option | <u>Migrate</u> to Time and Labor | <u>Interface</u> Data into Time and Labor |
|--------|---|--|
| 1 | <ul style="list-style-type: none"> • All MyLeave Users • Manual/Paper Systems | <ul style="list-style-type: none"> • All 3rd Party Systems* |
| 2 | <ul style="list-style-type: none"> • All MyLeave Users • Manual/Paper Systems • Some 3rd Party Systems* <ul style="list-style-type: none"> • Systems TBD | <ul style="list-style-type: none"> • Remaining 3rd Party Systems <ul style="list-style-type: none"> • Systems TBD |
| 3 | <ul style="list-style-type: none"> • All MyLeave Users • Manual/Paper Systems • All 3rd Party Systems | |

**Staggered go-lives may be planned post “Day 1” for 3rd party data conversion activities.*



DRAFT: T&L Project High Level Timeline

PENDING INPUT ON RESOURCE AND FUNDING APPROVAL



Assumptions:

1. Initial demos required as a pre-requisite to finalizing campus resourcing and budget asks
2. Present planning proposal to VCG in August; hire/onboard consulting resources in August and kick-off the Planning Phase in September
3. The campus core project and SME resources can be made available as requested during the specified times
4. Decision-making during requirements, fit-gap sessions as well around business practice and process areas are efficient



Immediate Next Steps

- All Campuses
 - Targeted 3rd Party Inclusion for “Day 1” Go-Live Working Group (Apr - June)
 - Preparation & Initial Product Demos (Apr – June)
 - Estimation of Campus and System Effort (June – Aug)
 - Updated Project Costs Presented to VCG (Aug)
- CU Anschutz
 - Review existing 3rd Party contract renewal dates
 - Assess the feasibility of reducing the number of instances of the same 3rd Party System, e.g., 4 Kronos instances to 1 instance
 - Halt any acquisition of new time keeping solutions



Questions



Talent Acquisition Update - CIRCA

Elby Potter, Classification Team Lead

Human Resources





Talent Acquisition Update - Circa

New Diversity Job Posting Partner

As of May 1, 2024, our campus partnered with Circa. This partnership aligns with our Holistic Hiring campus initiative, which aims to dedicate resources to developing and implementing a proactive strategy to advertise job opportunities to diverse communities.

We are conducting a one-year pilot with Circa to see how it impacts the diversity of our applicant pools.

What is Circa?

Circa is a job posting vendor specializing in increasing diversity recruitment efforts by posting jobs on various job posting sites targeted toward underrepresented populations and community-based organizations.





Circa

What does this mean?

To ensure a broad and diverse outreach is being made, with the addition of Circa, our jobs will now be posted in even more places.

What are the benefits?

- The ability to attract a broader, more diverse applicant pool
 - Circa has over 600+ sites across the US with over 15K+ community partners in the network
- Automation – Circa reviews the job posting and based on the duties, forwards the job to local organizations to share with potential applicants
- Metrics – Circa provides metrics on how a job post is doing. We can see how many people viewed the advertisement and how many clicked the apply button

Using Circa

What steps do I have to take to use Circa?

The addition of Circa does not change the job posting process. Once a position is posted for CU Careers, Circa automatically scrapes our jobs and posts them to other diversity-based, state-wide, and community-based sites. The department does not need to take additional steps for their jobs to be shared.

What sites within the Circa network will the jobs be displayed?

Our jobs will appear on all the diversity-focused and Colorado diversity and community sites.

How can I learn more?

- Check out our [Advertising Resources](#) page, which has all our advertising resources, including Circa
 - This resource includes a list of the sites where Circa will post the positions
- For additional questions, please contact Lindsey Fouquette via email - lindsey.fouquette@cuanschutz.edu

Questions?



FLSA Update

Florie Montoya, Assistant VC of Talent Acquisition, Classification,
Compensation & HCM

Human Resources





FLSA Salary Threshold Update

Florie Montoya

High Level Summary of Changes:

- **Standard Salary Level:** The final rule increases the minimum salary threshold to \$43,888 on July 1, 2024, and then to \$58,656 on January 1, 2025. This is an increase of nearly 65% from the current \$35,568.
 - This means that to remain exempt, an employee must meet the per week amount of \$1,128, up from the previous \$684 per week by January 1.
 - The new salary level is based on the 35th percentile of weekly earnings of full-time salaried workers in the lowest-wage Census Region.
- **Salary Level for Highly Compensated Employees:** The final rule increases the salary level for the Highly Compensated Exemption (HCE) from its current level of \$107,432 to \$132,964 per year on July 1, 2024, and then to \$151,164 on January 1, 2025.

High Level Summary of Changes:

- **Duties Test:** The rule does not make any changes to the duties requirements, and both the salary and duties test must be met to qualify for “white collar” exemption from overtime criteria.
 - The final rule still includes *exceptions to the salary level* and salary basis requirements for *teachers, lawyers, doctors, medical interns, and medical residents*.
- **Automatic Updates:** The threshold will be automatically updated every three years by tying the threshold to the 35th percentile of weekly earnings of full-time salaried workers in the lowest-wage Census Region. The automatic updates will begin on July 1, 2027.

Initial Impact Analysis Summary

- Reviewed DOL guidance/partnered with Legal to review positions exempt from salary test and/or combination of jobs created salary above threshold
- Cost impact analysis based on April 1 salaries. HR working on repeat based on proposed merit salaries provided by Budget Office.
- Using the opportunity to review all exemption determinations - entry level positions (currently non-exempt based on current interpretation of duties test but who meet salary threshold) and other exemptions (learned vs professional)

Impact Analysis – Out of Scope

In dialog with Legal Counsel and review of FLSA guidelines, we excluded the following categories from our scope of review:

- Professional/Administrative/Executive duties AND meet updated salary threshold
- Faculty practicing medicine or primary duty is teaching
- Teaching Assistants
- Student Stipends/Predoc Trainees
- Faculty Retirees who practice medicine or teach
- Medical Residents
- Research Faculty (with JD updates)
- Research Assistant (1505)
- Graduate Assistant (1502)

Impact Analysis – In Scope

In dialog with Legal Counsel and review of FLSA guidelines, we included the following categories in our scope of review:

- Post Docs
- PRA, Senior PRA, Research Associate, Senior Research Associate
- University Staff
- Classified Staff
- Staff Retirees
- Pharmacy Residents

Completed/Next Steps:

Completed

- Initial impact analysis complete based on 4/1 salaries
- Narrowed scope based on primary job or combination of jobs
- Narrowed scope based on allowable exceptions
- Partnering with Legal

Next Steps

- Finalizing analysis for 7/1 and 1/1 thresholds based on narrowed scope (7/1 salaries)
- Campus Decisions – Two implementation dates or one
- Guidance will be provided to help determine if an employee's salary should be raised or whether they should be reclassified to non-exempt
- Does a department choose to leverage compensatory time (banked overtime) as a cost mitigating tool? If so, are tracking procedures adequate to address compliance risks?
- Training for campus managers unfamiliar with non-exempt timekeeping and workload management

Additional Discussion/Questions?

Thank You for Joining Us

Next HR Community Meeting
August 6, 2024
10:00-11:30