



Minutes from Staff Senate Monthly Meeting of December 14, 2017

Location: Newcomb Hall, South Meeting Room

Time: 11:00 AM–1:00 PM

Meeting Summary

Welcome and Announcements: Jess Wenger and Michael Phillips - Co-Chairs

Presentation: UVA Finance: Melody Bianchetto – Vice President for Finance

Presentation: Ufirst: Julie Bird

Meet and Greet: AVP of Service, Human Resources: Adam Weikel

Announcement: Legislative Forum: Leah Hicks

Senate Spotlight: Mary Cook

Senate Business: Updates: Executive Committee

Senate Business: Open Floor: Staff Senate

Welcome and Announcements

Jess Wenger and Michael Phillips, Co-Chairs

- Diane Ober and Bruce Carveth were present with digital attendance system so those in attendance could sign in. Paper sign in was passed out.
- Parking passes for Central Grounds Garage were made available.
- If you have something to send out to the Staff Senate, please it to the send to Executive Committee and they will compile and send out.

Information Security Briefing

Melody Bianchetto – Vice President for Finance

- Passed around UVA Finance postcard
- Talk about things being done internally
 - Aligned and working together as finance begins a transformation
 - UVA Finance
 - Creates and manages financial analysis, doing the budget, managing UVA's financial model, cost analysis. It includes:
 - UVA Financial Operations (Controller's office)
 - Payroll
 - Office of Sponsored Programs (OSP)
 - Student Financial Services

- Billing and collecting, as well as awarding financial aid
- Managerial Reporting Project
 - Creating data store and delivering UBI – replacing Discoverer and creating new modern analytical tools
- Financial Compliance
 - training and financial policy and procedure
- Big task ahead
 - How do we make three teams feel like one big team?
 - In January, 2016 entire team was pulled together for appreciative inquiry
 - What does all of this mean and how do we come up with what it is?
 - Wanted to find out what UVA Finance does well, what brings us pride, how can we do more of that work?
 - Started with groups of 2, hopefully someone they didn't know
 - Interviews – what can we do better?
 - 8 sessions where we facilitated how do we come up with common themes
 - Held a full day retreat – how do we tie all these themes together to establish values and a mission?
 - Established UVA Finance Mission Statement
 - Be the one people turn to first
 - Articulated values
 - How do we look for new ways to do things?
 - How do we solve problems?
 - Collaborative partners
 - Value in high performing teams
- HR's transformation is important to review as we determine what future state of UVA Finance is going to look like.
 - Created employee engagement team and employee development team
 - Employee Engagement
 - At Carruthers, someone comes in every Wednesday for an activity (art, massage, yoga)
 - Guided meditation
 - Mindfulness through art
 - Breaks in the middle of the day to connect, take time to be thoughtful, take your mind off your work for a bit.
 - Finance Fridays – everyone wears UVA Finance gear

- Restaurants in Barracks give discounts to encourage people to get together with team for lunch
- Drawings
 - If you wear your shirt, you can win door prizes (last Friday of the month)
- Food truck Fridays
 - New terrace – lower level – just broke ground
 - New patio
 - New bike racks
 - New picnic tables – no mud and spiders
 - Landscaping will be added in Spring
 - Funded, in part, by Grounds Improvement Fee – put forth a proposal
 - Smokers pots – EHS determined two dedicated places for that
 - Took them out of other spaces
 - Renovations on second floor of Carruthers
 - Wanted to encourage people to get to know each other
 - Where you're from map
 - Appreciation board – write note and recognize
 - Finance Fridays – take notes down 1x a month and do drawing
 - Communication board – put up announcements
 - 4 events per year
 - Holiday Party
 - Spring Fling
 - Cornhole Tournament
 - Employee Appreciation Breakfast
 - Some collaboration with ITS and UHR
 - Other efforts
 - Finance trainers internally
 - Creating a Lynda.com playlist
 - Lunch and learn webcasts
 - Phishing exercise
 - Dramatically changed click rate
 - Created certificate programs within Finance
 - Partnered with Darden School to create LEAN certificate program
 - 3.5 full days of training
 - Created “common language-“ mini MBA program
 - Instead of sending 250 employees to get MBA, bring concepts to employees.

- CLE collaboration – Cornerstone Program project
 - Business Analytics program
 - SCPS will deliver business analytics course for finance folks as part of Cornerstone Program implementation
- Management Development
 - Want high-performing teams
 - Didn't have consistent practices
 - How do we approach rankings?
 - Do we have a common set of values?
 - Employee Relations issues
 - A lot of these things weren't addressed
- Require managers to complete a CLE program
 - 360 assessment
 - Personal development plan
 - Personal coaching
- “Get Grounded”
 - Field trip experience
 - Eclipse kicked it off
 - Get out of Carruthers – take 10 to 15 people to get out to see what's going on within University
 - Don't have to do every one and don't have to do every time
 - Projects Underway:
 - Managerial reporting project and UBI
 - Sunset Discoverer this fall and in early 2018.
 - Click
 - How can we use to create better queries and reports?
 - OSP
 - Research UVA – moved from paper-based to searchable
 - Everything in one place
 - Electronic approval form implemented –fully online this July
 - Proposals created fully online and follows lifecycle
 - Workday will have its own set of tools, but will often be interchangeable
 - How to get the results you want

- Finance Strategic
 - Issued a RFI and have gotten back proposals from consulting firms
 - Considering Workday Finance – will that work?
 - Identify gaps and see if there is another program that could better fit us.
 - Tell us where Workday doesn't fit our needed solutions.
 - Huge piece of next 6 to 8 months: create identity of what finance transformation looks like
 - We are not necessarily going to follow the process of UFirst. Finance is different. How do we recognize what everyone needs out of their approach to Finance; how do we meet these needs?
 - What's out there, what's going on and how do we answer those questions?

- Planning assessment
 - Define the problem
 - What do we want to fix?
 - What is the scope?
 - What are our gaps?
 - What does future state look like?
 - What do we need to do to get started?

Q: With Payroll now being under finance and Ufirst combining academic and Medical Center HR processes, could the pay dates change?

A: Changing payroll dates is not in the immediate plan, but it could possibly streamline processes. We didn't want to do too much change at the same time (Workday and change in payroll, etc.), but will give it consideration after Workday go-live.

Q: Can you clarify who signatories are and what is their level of responsibility?

A: They are managed from the board level. Includes Megan Lowe, Gary Nimax and Pat Hogan, in general. Are working on this process now to make sure it is more effective. We can take specific discussion (of OSP) offline.

Q: At the School of Medicine, there has been a lot of confusion. Are they supposed to be using UBI instead of Discoverer? When is Discoverer done?

A: Finance GA and GL is done. Student will be done in early 2018. There is still HR legacy data I Discoverer and we are working with the Ufirst team to see how that can be used. We won't be able to take Discoverer fully out until later in 2018. Hopefully, if there is anyone still using it, they can get it in

and begin using UBI instead. Let the Managerial Reporting team know if there is data you need and can't get in UBI. If it's student related, it will help us determine if we're ready to take that offline.

Q: What is the methodology on the certifications for the UVA Finance team that you earlier mentioned?

A: There are different approaches. We want to be sure we take what people are learning and add to it.

Ufirst Update

Julie Bird

- What is Ufirst (**See slide 5**)
- Ufirst is not the name of the new state
 - Bringing together HR functions across University
 - High level goals
 - Enable team to save time and energy with simplified processes
 - Automating processes with an easy-to-use HR technology
 - Supporting the attraction and retention of top talent – staff, faculty, physicians
- How will I interact with HR? (**See slide 6**)
 - Integrated model delivers expertise and agility
 - Aligned HR support in the following areas:
 - Business Partners
 - Employee Relations
 - Staff Recruitment
 - There is an entire network of people behind each of these areas
- When will change happen? (**See slide 7**)
 - Incremental change will begin this fall, building to full UVA HR organization in July, 2018
 - Transition planning – work sessions as we go along
 - Ongoing training and support
 - Training will kick off in May – July (for staff). Will continue as needed in August and September
- What can I expect (**See Slide 8**)
 - Technology
 - HR Solution Center
 - Better integrated support system
 - Specialists for payroll, benefits and leave
 - Staff Performance Management and Recruiting
 - Lead@ is going away
 - Jobs@ is going away
 - There will be changes to staff hiring support
 - Including new support for pre-boarding and Onboarding

Q: For Lead@, if I enter my goals in current system will that move over?

A: Yes, it will transfer over, and it will be an automated transition. You will get an email to tell you what to do. Likely, this will be in January.

Q: Will School of Medicine and School of Nursing do this in the same way?

A: We are not adjusting performance cycles. School of Medicine is considered Health System. Workday can handle calendars. You don't have to do anything to translate dates.

- **Workday Training Offerings (see slide 9)**
 - We will offer face to face and in person.
 - Will offer all resources, as well as instructor-led training
 - Staff and team member training anticipated to be minimal
 - Management training will be more robust
 - Will also offer videos, computer based training, worksheets, etc.

- **Workday Partners Program (see slide 10)**
 - What are workday partners?
 - How will they support me?
 - Be on the lookout for additional details

- **How can I learn more and participate? (see slide 11)**
 - Workday demos
 - Ufirst website – <https://ufirst.virginia.edu>
 - Preview and Feedback sessions in February - will get a formal invitation
 - **(See slide 12)**

Q: How do we know where our workday partner is?

A: Will post on the Ufirst website when all are confirmed.

Meet and Greet

Adam Weikel – AVP of Service, University Human Resources

- There are three AVPs in HR
- Adam is AVP for Service of HR
 - Service has already launched; introducing Adam
- Adam moved to Charlottesville recently, from Boston
 - Served as Associate Chief of Staff for Governor of Massachusetts
 - As AVP of Service at UVA, Adam oversees two key areas:
 - Business partner structure
 - Embedded in units and areas who are experts in contemporary HR
 - Align and be experts in your business needs – your college, goals, etc.
 - We can then align HR strategies structure to work for you

- Solutions center
 - Inquiry – first outreach to HR – launched 2 weeks ago
 - Highly trained folks, one central location
 - Teams learn from each other
 - Customer satisfaction ratings from email after call – have been at all-time high– 4.85 stars out of 5.
 - Areas still need improvement; learning opportunities based on your feedback
 - Benefits, leave and payroll – direct deposit, paycheck, etc.
 - Higher level of engagement with employees than in recent years
 - Talent Support – candidate support – mitigate barriers of new employees

Q: I have an employee who started as a temp on Monday. The process fell apart. Back and forth with service center and business partner and IT. Nobody seems to know where the issues are.

A: Those parts of Onboarding are incredibly difficult to know who controls them all. We just started this week launching groups who will coordinate these efforts in a better way. Until now, we've been really focused on processes of HR. We have been talking about having service agreements between organizations; who is accountable for what. We are getting started with that. Those are intentionally overlapped. Broader relationships need to be built and improved upon.

Q: Business Partner. Our school had one and is now getting a new one, I think. When does the new person start; when does that settle out? We have had some real challenges and need someone on board to assist.

A: Global view, we hope to have that settled by Spring, but school by school, we are finding opportunities to get the process escalated. Some schools and units will try to get it launched earlier. Hopefully, you won't notice the transition as much. When someone leaves, we are very conscious about being sure all the work they are doing lands somewhere, so the department won't be impacted in a negative way. 85 to 86 percent of future state business partners will come those who work here in the current state. In the long term, we need to stabilize this by April. No doubt, then next few months will be a little bumpy. There are individualized plans for each area. We can have individual conversations if there is a need.

Q: I'm curious about the size of the staff in the solutions center and specifically in the call center.

A: We are slightly above where we will end because we will hire around workday implementation. We will settle out around 10, right now we are at 12. This is based on your expectations. It is a function of the number of staff.

Q: Is there going to be an immediate change for us because of CVS and Aetna?

A: (Kelley Stuck, VP-CHRO): As an employer, we have a negotiated deal and a contract. We are a ways out from that. We are planning to go to market in 2019 for calendar year 2020. We have been planning to do that for a while. We are watching what happens. There shouldn't be immediate impact.

Announcement: Legislative Forum

Leah Hicks – Office of State Governmental Relations

- December 20, 2017, 12:00 – 1:00 p.m.
- The Forum will feature delegates and senators from Central Virginia who will share their perspectives about the 2018 General Assembly Session, including issues affecting higher education, healthcare, and the local community.
- Hosted by President Sullivan and the Office of State Governmental Relations
- Time will be reserved for questions and comments from the public.
- All of UVA is invited – spread the word

Staff Spotlight

Mary Cook – User Experience Manager, ITS

- Usability testing
 - Understand the user experience (**see slides 14-17**)
 - Be a part of the solution
 - Understand what the experience is like – objective way to test
 - Staff watch and listen, and identify top tasks
 - If there is a system you think needs improvement, sign up to have it tested
 - No obligation
- Staff Spotlight presenter needed for January meeting

Senate Business – Executive Update

Jess Wenger and Michael Phillips, Exec Co-Chairs

- Senate Representation Working Group (**see slide 18**)
 - Led by Amy Muldoon
 - Will share a proposal with Senate in January

Q: What is this working group working on?

A: Determining if Alternates are still needed/good for Staff Senate. If they're determined not to be necessary, the group will determine how representation changes and what we need to do.

- Maggie Stein: BOV Meeting Update
 - Find notes online
 - Rector's notes working on living wage
 - Report on events from Aug 11 and 12 – climate survey for the University
 - Have proposed that we start a new committee on age of segregation
 - Woodson center has now become an academic department
 - Report – external audit assessing all safety at UVA.
 - Had a number of recommendations, which board is considering.

- Consolidate all under one AVP for better communication – one recommendation
- Our Staff accreditation was renewed for another 10 years
 - There is a new standard.
 - BOV is required to more clearly define the expectations for their work.
- From Faculty Senate report
 - Sessions to discuss retirement – aware that faculty are not always using their benefits.
 - Recap of Women’s Leadership Forum
 - Recap of Bicentennial
- Exec Update (**see slide 20**)
 - Meeting with UVA HR Advisory Committee – seat for a Senate member
 - AJ Young will be the Staff Senate member
 - Continuing to analyze the usage of the Education Benefit
 - Pilot is continuing
 - Identity Fraud Insurance
 - Are looking into as voluntary benefit, are exploring options
 - Fun with Kelley Stuck
 - Exec went to a basketball game in President’s Suite (**see picture, slide 21**)
- Open Floor Discussion
 - Advocacy
 - Will meet again on January 9 at 2400 Old Ivy Road, Room 315 from 11 a.m. – 1 p.m.
 - Education Benefit Program will continue as a pilot
 - Came up with ideas to better look at the plan
 - Don’t want departments to require employee to take a class as part of their job and use their education benefits to pay for it
 - Michelle Small had time set up with Bryan Garey and Joe Esposito
 - This is on the back burner as we don’t know what Education Benefits look like; tax reform may change
 - Parental Leave
 - Have done a lot of research and have presented to HR
 - Isn’t off the table; will look into it and see if they can offer in the future
 - We will welcome more ideas in January meeting
 - Looking into retiree benefit options
 - Have been told of some issues where retiree benefits are extremely expensive
 - Are there other options and who responds to them?
 - Advocate for helping to offset their costs; are there other options instead of high premiums

- The new HR Advisory Committee: Staff Senate member A.J. Young is on their committee too... so that that can interface.
- Gave AJ things to ask at the last meeting. Hoping to bring that information back as well. Could get quicker or clearer answers.

Q: I'm new to Staff Senate. If we have something to say about an issue, who do we take it to? Had a constituent come and ask me if I could address something. Not really sure what to say or when to say it.

A: Depends on what the issue is. If it's a specific HR question, go there. If it's a different issue, bring it to us, so we can ask deeper questions. We try to avoid letting every little nitpicky thing getting funneled up through Staff Senate. We may not have a leg right now to work to change anything with HR. They are not in a position until after transition is complete to make any changes. Maybe in the future. Yes, we want Staff Senate to help other staff find the resources they need. If practice doesn't match the policy, we have to consider levels of fairness for staff. I would be curious if people get that type of response from leadership in their schools and units. If it's a one off thing, we're not here to advocate for just one person. We want to be sure that we are advocating for something that benefits a group of staff or all staff, not just one person. But, bring it to us, and we can always discuss it. It never hurts to ask and it could be of genuine concern to a number of people. I think it all depends on whom you serve and what you do. Some issues impact some but, may not apply to everyone. The issue could be area specific.

Q: If you hear from a constituent and there's a problem and it's the same department and same manager, but not necessarily the same issue, do you send them to HR and ask them to advocate for themselves? I have asked them to approach HR as a group.

Q: Are you referring to a personal issue with a manager?

A: Yes.

A: Then, I think advice you have given to them is appropriate. It's going to require HR's involvement. Respect@ is an online system where you can lodge an anonymous/or not complaint. It is difficult if you lodge it anonymously because you don't get the follow-up, HR can't investigate, etc. They will really have to bring it forward to get the issue addressed.

Comment: How can people know more about the Staff Senate? I have a professor who works with me and is on Faculty Senate. They are not as open as we are about bringing issues to light. Faculty Senate professor referenced Staff Senate as being more open and democratic. And the professor mentioned he likes the way Staff Senate does things.

Next Meeting:

- **Thursday, January 11**
Newcomb South Meeting Room
11:00 AM – 1:00 PM
UVA Library Resources