

HR Organization Assessment Survey Data Review

December 10, 2015
Indianapolis, IN



HR2020 Survey Results Agenda

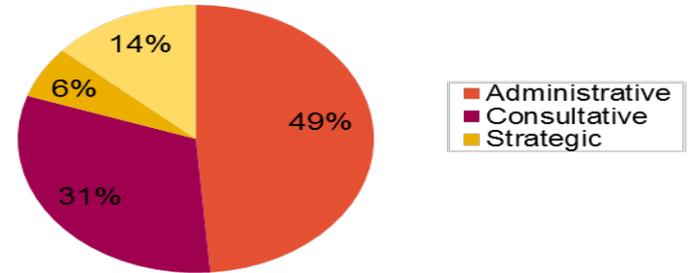
- Welcome / Overall Timeline
- Survey Background and Results Review
 - HR Activity Survey
 - HR Customer Survey
- Focus Group Results

Timeline (4-6 month look ahead)



Background – HR Activity Survey

- **The HR Activity Survey was administered October 29 - November 6:**
 - Captures the distribution of HR-related activities across the organization
 - Includes 279 activities typically performed across 14 major functional areas in HR
 - Participants included 304 staff across the University who perform HR activities; a total of 192 individuals responded for a response rate of 63%.
- **Key Survey Findings included:**
 - In general, employees performing HR activities are engaged in a very wide range of activities, meaning the work is highly fragmented across all HR functions
 - A higher than average percentage of time is spent performing administrative / transactional activities and significantly less time is spent on strategic, higher value-added activities and services
 - There is a significant level of staff involvement in a number of administrative activities that should be considered for process optimization, including tasks such as:
 - Employee data entry / management, including new hire, transfers and termination processing
 - Customer service across all HR functions
 - Recruiting and on-boarding
 - Employee relations



Background – HR Customer Survey

- **The HR Customer Survey was administered October 29 - November 6:**
 - The participants included all HR employees and select clients from all divisions
 - 776 of 1,909 total employees participated, for a response rate of 40.6%
 - 207 HR associates responded
 - 569 HR customers responded
- **The survey included:**
 - 59 HR activities across seven key functions: Communication, Compensation, Benefits, Employee Relations, HR Technology, Organization Effectiveness, and Talent Management
 - Ten behavioral attributes describing the HR function as a whole
 - Twelve overall HR function behavior questions
- **Participants were asked to rate the Importance of and how well HR met their needs for each activity and behavioral attribute**

HR Customer Survey Participant Profile

Total Participants	Percent Complete
776	40.6%

RC Grouping	Number of Respondents
Academic (roll-up)	121
Admin And Fiscal Affairs-IUSB	3
Administration (roll-up)	64
Administrative Affairs-IUS	8
Arts & Sciences-IUB	35
Budget & Fiscal Affairs-IUB	26
Capital Planning & Facilities-UA	17
Division Of Student Affairs-IUB	13
Exec VP University Academic Affairs-UA	32
Executive Management/Academic-IUB	11
Facility Operations-IUB	9
Finance And Administration-IUPUI	22
General Administration-Regionals	17
General Counsel-UA	10
Kelley School Of Business-IUB	20
Office Enrollment Management-IUB	10
Physical Plant-IUPUI	14
School Of Medicine-IUPUI	70
Service (roll-up)	66
Single RC Participant	10
Undergraduate Education-IUB	11
Vice President Information Technology-UA	86
Vice President Research-UA	14
Vice Provost For Research-IUB	10
VP & Chief Financial Officer-UA	86

Job Grade Grouping	Respondents
Deans, Chancellors	29
Faculty	26
Hourly	2
Professional Exempt Staff - Directors	158
Professional Exempt Staff - Executives	34
Professional Exempt Staff - Staff, Managers	473
Support and Clerical Staff	54

Service Years	Respondents
Less Than 1 Year	41
1 - 5 Years	153
6 - 10 Years	139
11 - 15 Years	133
16 - 20 Years	116
21 - 25 Years	62
26 - 40 Years	120
Over 40 Years	10
Blank	2

Campus	Respondents
Bloomington Campus	444
East Campus	17
Indianapolis Campus	231
Kokomo Campus	20
Northwest Campus	23
South Bend Campus	20
Southeast Campus	21

Note: Results are not reported for rows shaded in grey due to the small number of participants in these groups.

HR Customer Survey Scale and Methodology Overview

Survey Scale

Importance	Meets My Needs
5 – High	5 - Strongly Agree
4	4
3	3
2	2
1 – Low	1 – Strongly Disagree
DK/NA	DK/NA

Methodology Overview

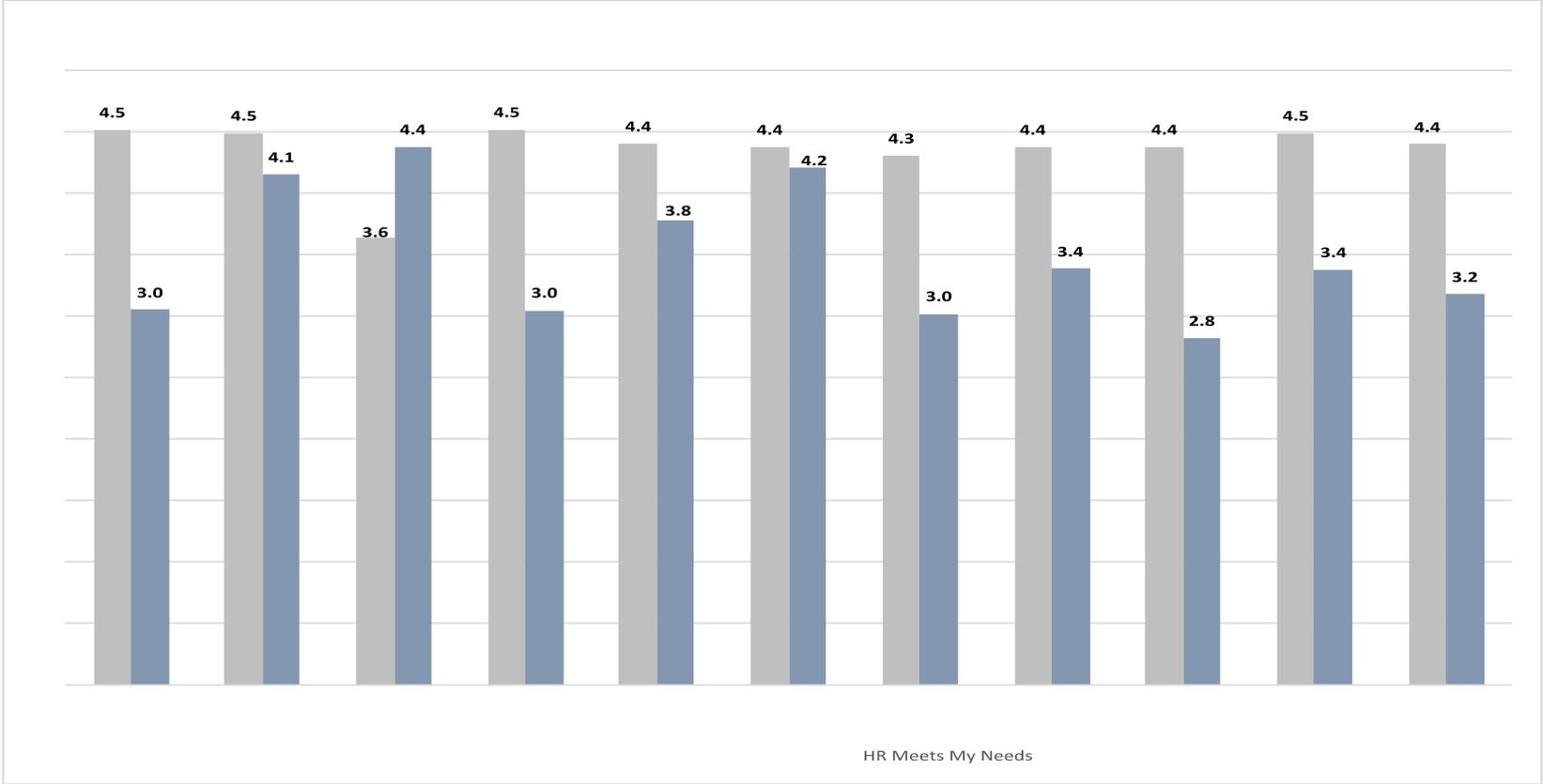
- Only the top two (5/4) or bottom two (2/1) combined scores were used for the data analysis.
- Scores of a 3 were treated as a non-neutral value and were omitted from the average calculations.
- The survey should be thought of not as a report card, but as a tool to understand priorities and where HR *excels or where it can improve* in order to determine the direction of the HR team.

Reception of Services

	University HR Office	Campus HR Office	Department HR Office	Does Not Apply	Blank
Communication	37%	31%	26%	3%	3%
Compensation and Benefits	45%	32%	18%	2%	3%
Employee Relations	28%	35%	26%	7%	4%
HR Technology	46%	24%	12%	15%	3%
Organizational Effectiveness	31%	25%	21%	19%	4%
Talent Management	25%	25%	23%	23%	4%

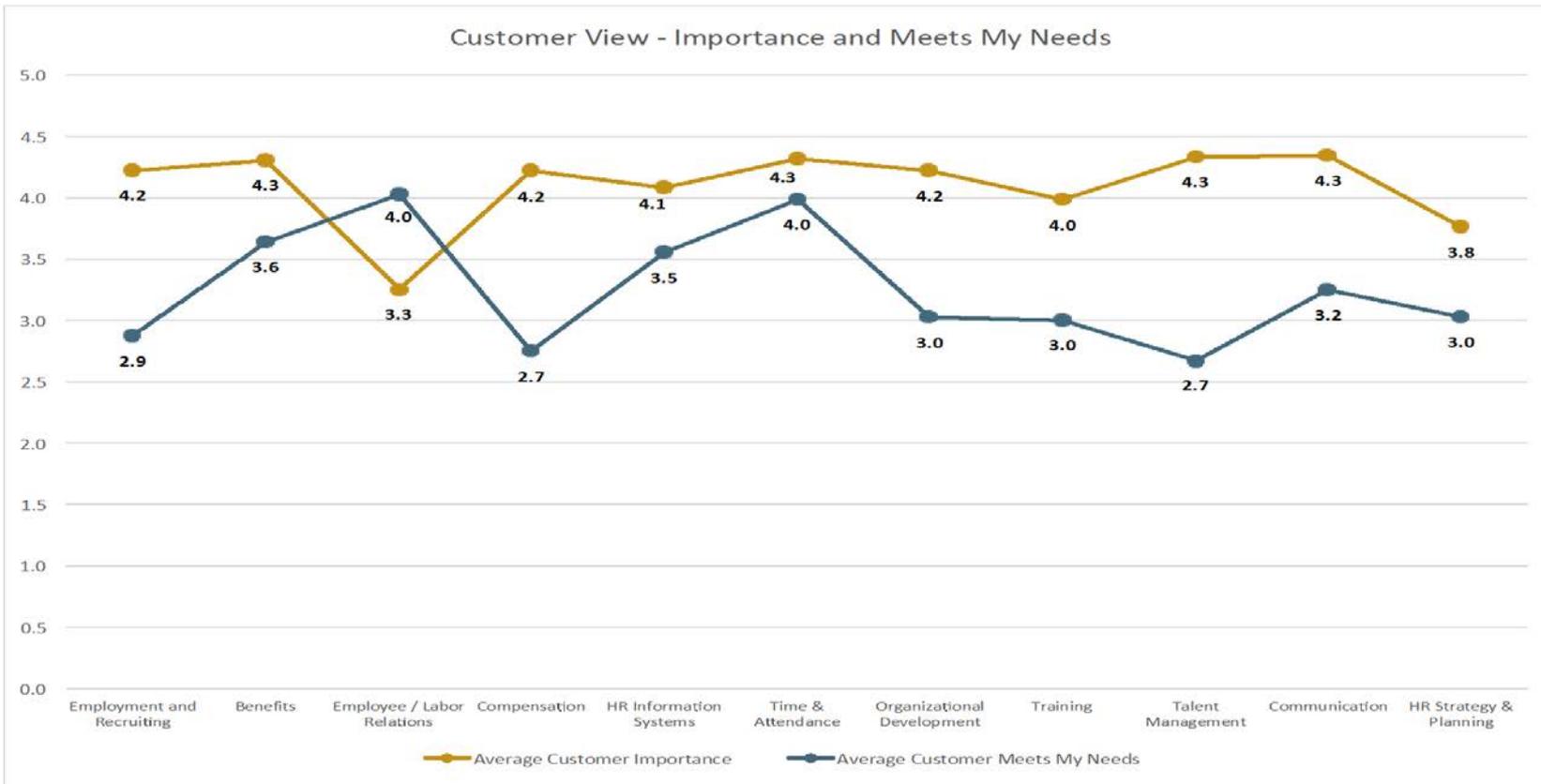
- 163 (21%) participants receive services only from University HR
- 107 (14%) participants receive services entirely from Campus HR Services
- 45 participants (6%) receive services entirely from Department HR Services

HR View – Importance and Meets My Needs



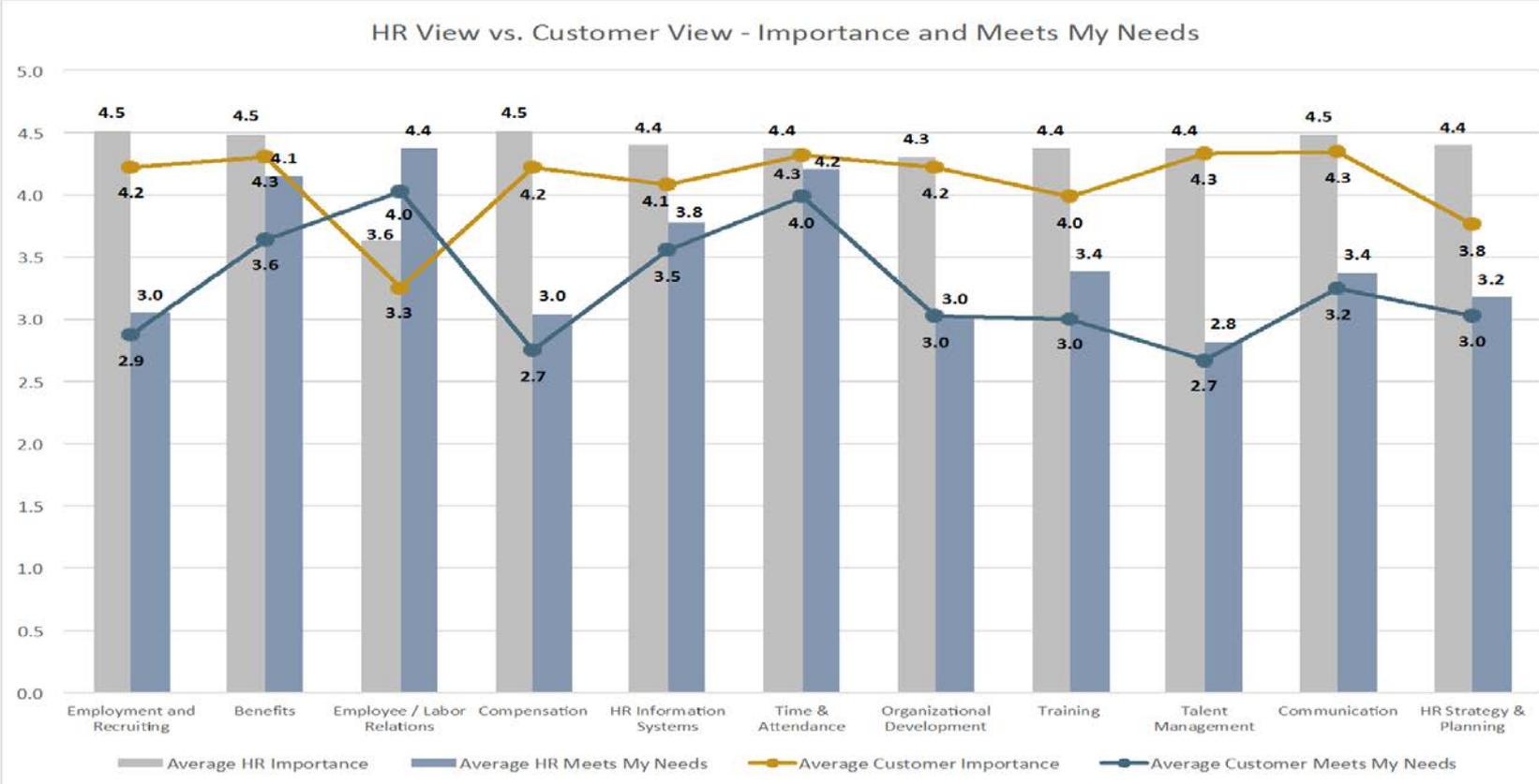
*Averages are taken only from non-neutral values for both importance and meets my needs

Customer View – Importance and Meets My Needs



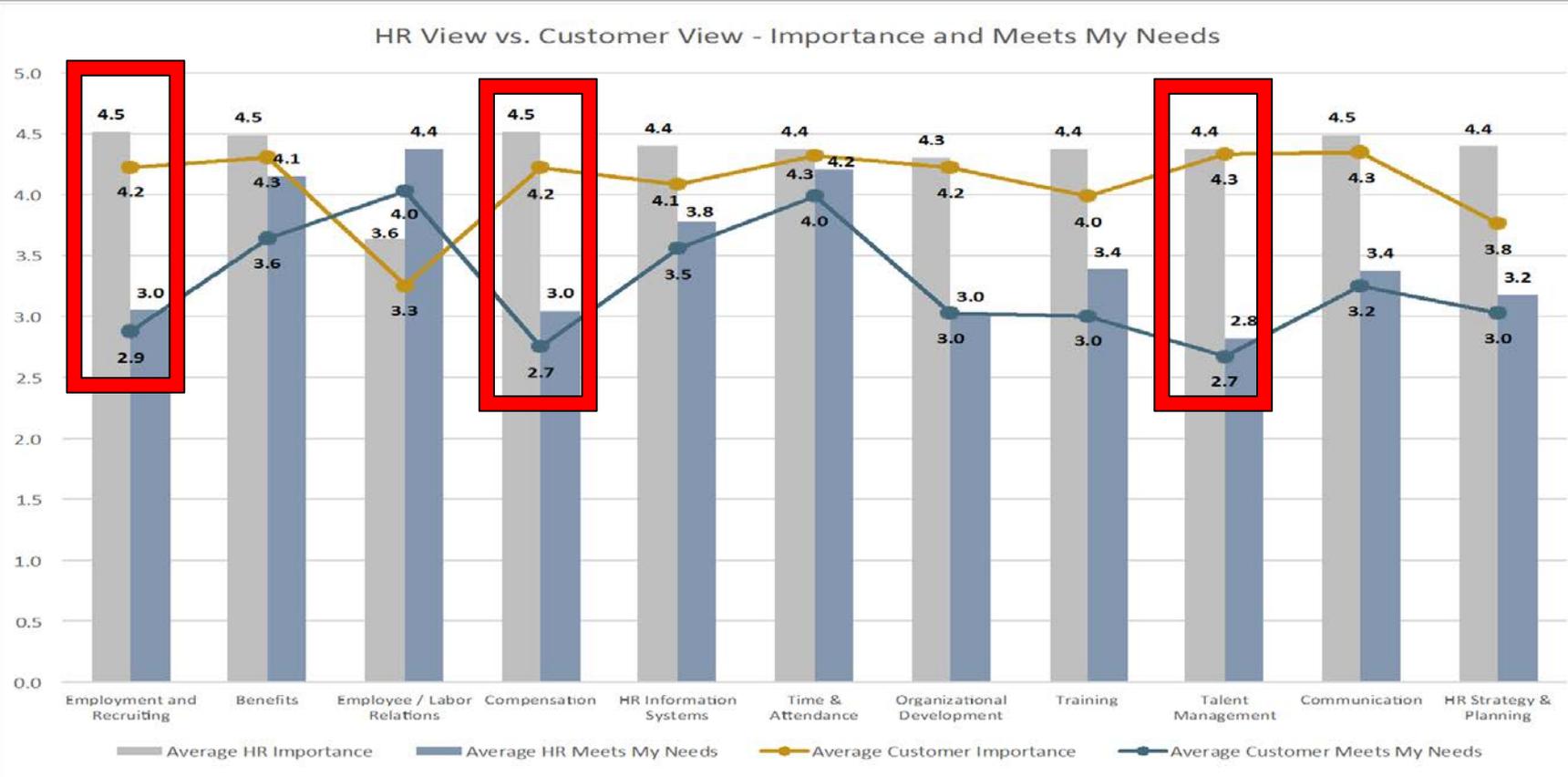
*Averages are taken only from non-neutral values for both importance and meets my needs

HR vs. Customer Views – Importance and Meets My Needs



*Averages are taken only from non-neutral values for both importance and meets my needs

HR vs. Customer Views – Importance and Meets My Needs



*Averages are taken only from non-neutral values for both importance and meets my needs

The Most Important Activities – HR vs. Customer

- Each table illustrates the ten activities that were scored as most important by each group
- Only 5 of the top ten activities appear on both lists of the most important activities

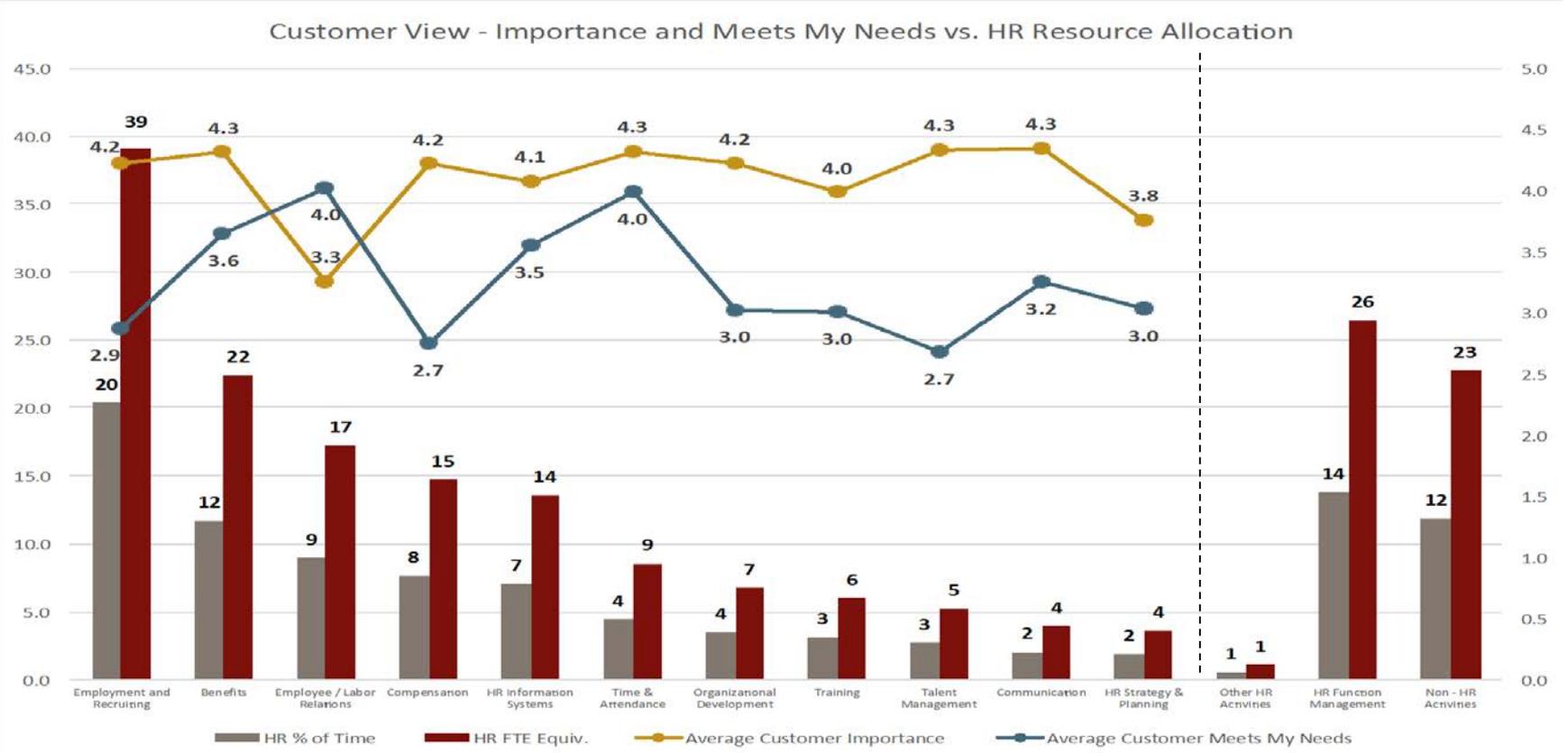
Total HR

Function	Activity	Importance	Both Lists?
Communication	Employee communications and publications	94.2%	x
Communication	Programs and policies	91.7%	x
Talent Management	Orientation and On-boarding	89.6%	
Benefits	Health and Welfare benefits administration	89.2%	x
Communication	Total Rewards	87.8%	x
Employee Relations	Employee counseling and conflict resolution	86.8%	
HR Technology	Health and Welfare benefits administration technology	86.3%	
Communication	Vision and Direction	85.4%	
HR Technology	Employee and manager self-service	85.4%	
Benefits	Designing benefits programs	85.3%	x

Total HR Customer

Function	Activity	Importance	Both Lists?
Benefits	Health and Welfare benefits administration	89.5%	x
Communication	Employee communications and publications	87.3%	x
Benefits	Managing health and welfare vendors	86.9%	
Benefits	Managing retirement benefits	85.6%	
Compensation	Developing compensation strategy	85.4%	
Compensation	Designing compensation programs	85.1%	
Compensation	Administering compensation	85.1%	
Communication	Programs and policies	84.0%	x
Communication	Total Rewards	83.6%	x
Benefits	Designing benefits programs	82.7%	x

Customer View – Importance and Meets My Needs vs. Resources



*Averages are taken only from non-neutral values for both importance and meets my needs

HR Resource Allocation – Fragmentation Examples

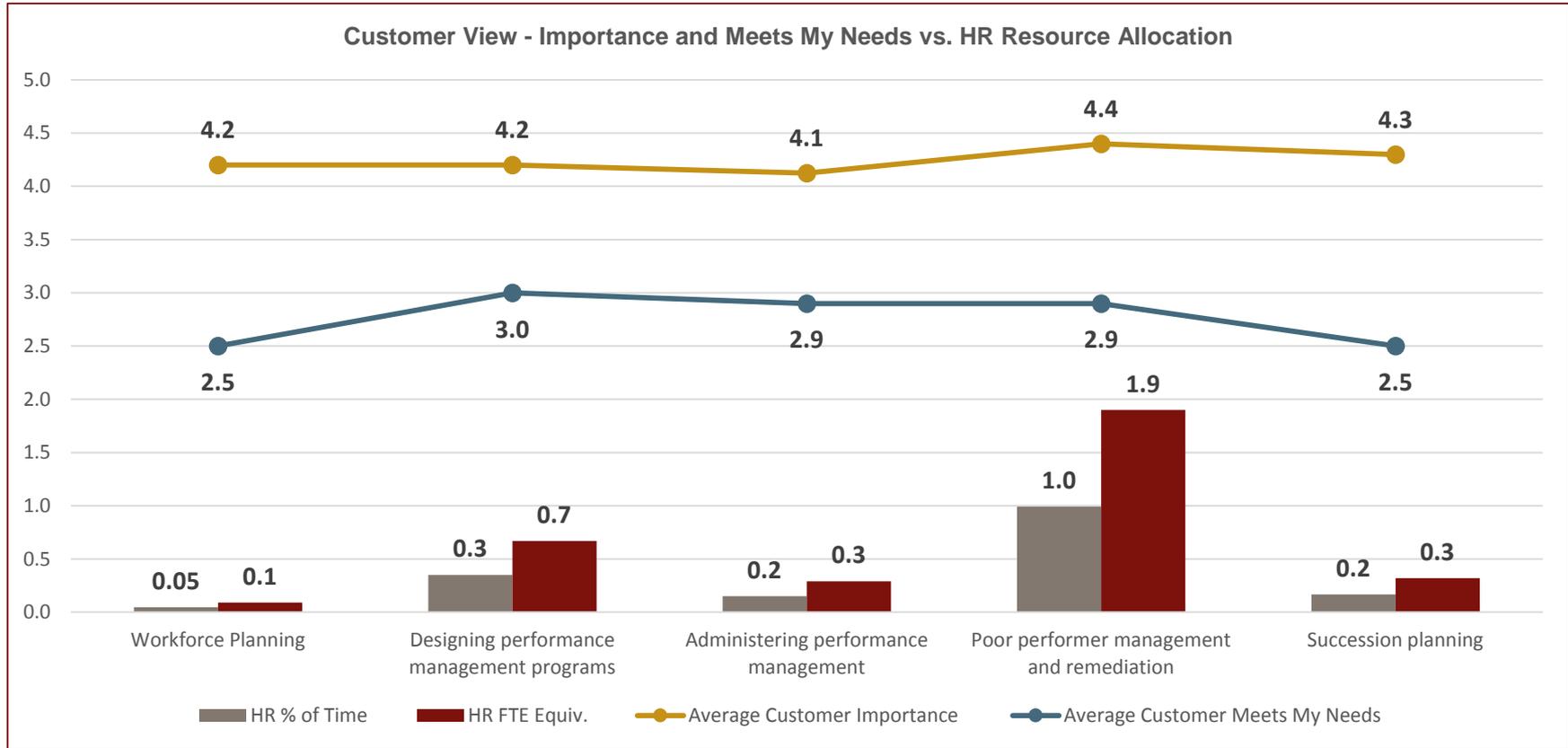
Top 15 Employment & Recruiting Activities sorted by Overall FTE

Activity Identifier	# of Staff	% Time	FTE
New Hire Data Collection / Processing	74	1.7%	3.28
OLA and PeopleAdmin Job Posting Administration	89	1.6%	3.07
Application / Resume Processing	61	1.5%	2.87
Candidate Interviews and Assessment	78	1.0%	1.91
Employment and Staffing Customer Service	70	0.9%	1.74
Position Requirements Development	81	0.9%	1.73
Requisition Processing	51	0.8%	1.58
Orientation	72	0.8%	1.57
Employment and Recruiting / Sourcing	67	0.8%	1.53
Pre-Employment Background Checks	63	0.8%	1.52
Employment and Recruitment Advertising	65	0.7%	1.41
Determining Job Offers	64	0.7%	1.28
Pre-Boarding	68	0.7%	1.27
Employment and Recruiting Program Strategy	46	0.6%	1.15
External Job Posting Administration	57	0.6%	1.14

Top 15 Benefits Activities sorted by Overall FTE

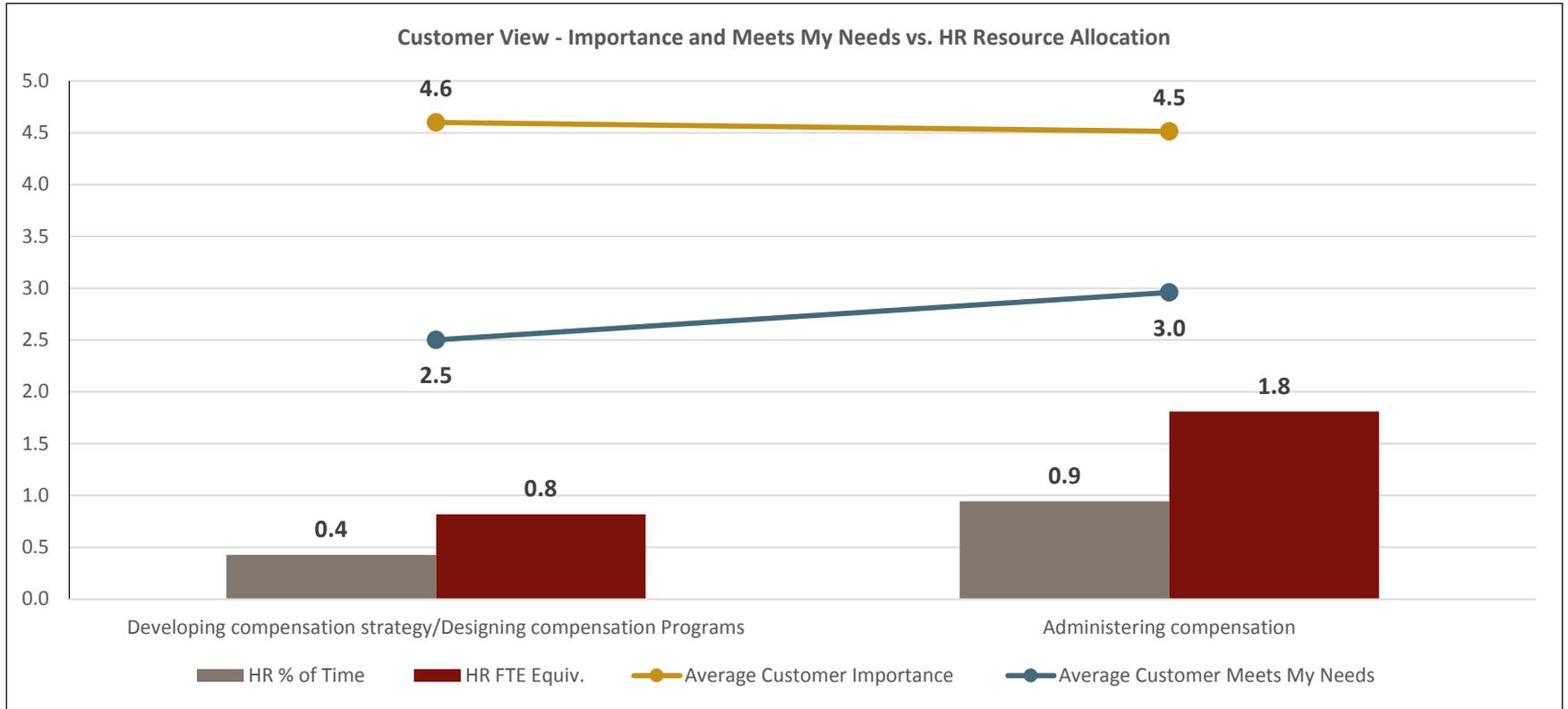
Activity Identifier	# of Staff	% Time	FTE
Benefits Customer Service	46	1.6%	3.13
Benefits Counseling	51	1.0%	1.84
Open Enrollment	27	0.6%	1.10
Benefits Administration / Enrollment	24	0.5%	1.05
Leave of Absence Administration	61	0.5%	1.05
Workers Compensation Plan Administration	12	0.5%	1.04
Benefits Administration	21	0.5%	1.00
ACA Administration	8	0.5%	0.92
Benefits Data Reconciliation	15	0.4%	0.79
New Hire Benefits Enrollment	25	0.4%	0.76
Benefits Reporting	9	0.3%	0.59
Benefits Communication Development and Delivery	16	0.3%	0.58
Life Event Administration	20	0.3%	0.54
Employee Health & Wellness Customer Service	12	0.3%	0.51
COBRA Administration	5	0.2%	0.47

Talent Management



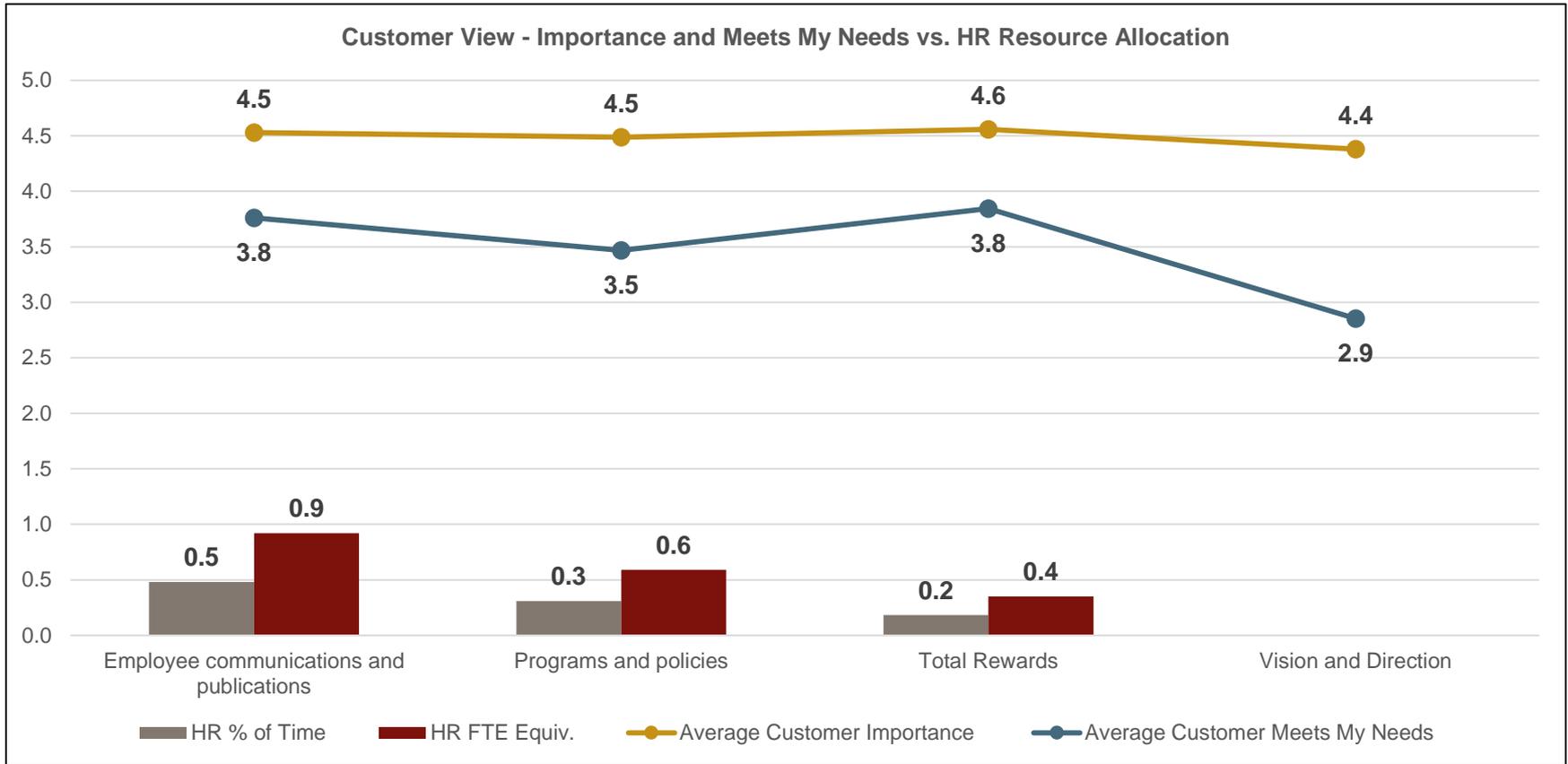
*Averages are taken only from non-neutral values for both importance and meets my needs

Compensation



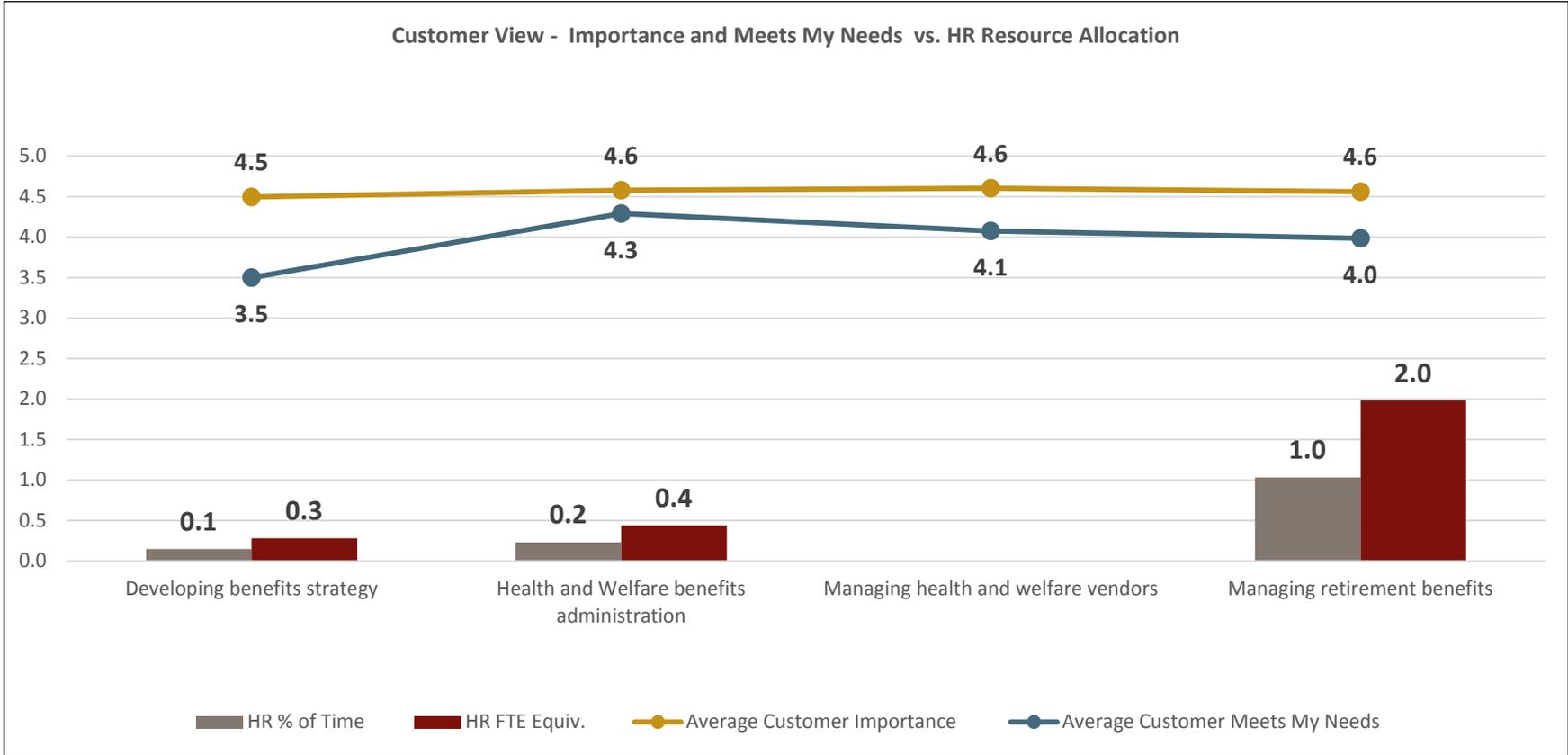
*Averages are taken only from non-neutral values for both importance and meets my needs

Communication



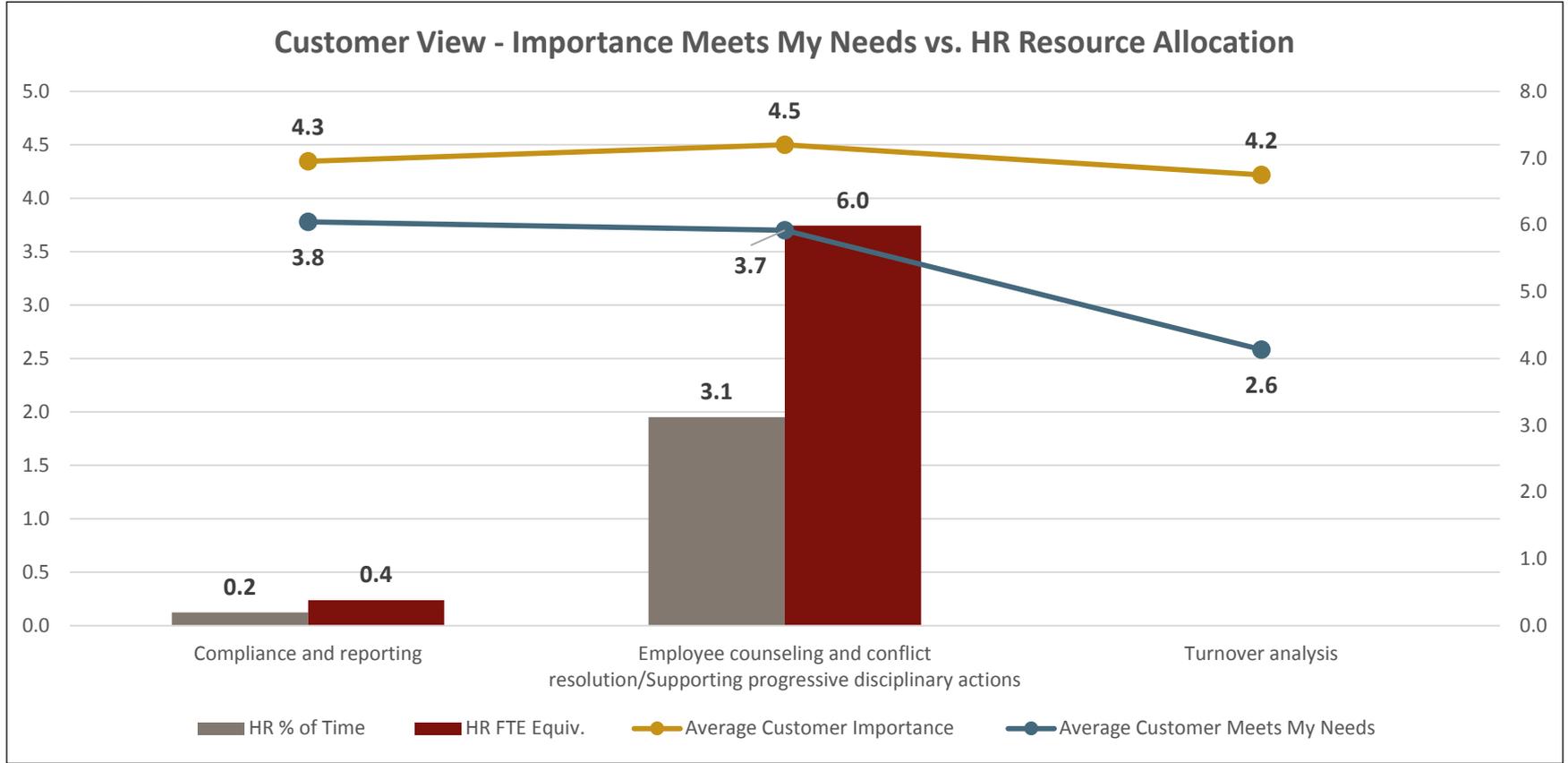
*Averages are taken only from non-neutral values for both importance and meets my needs

Benefits



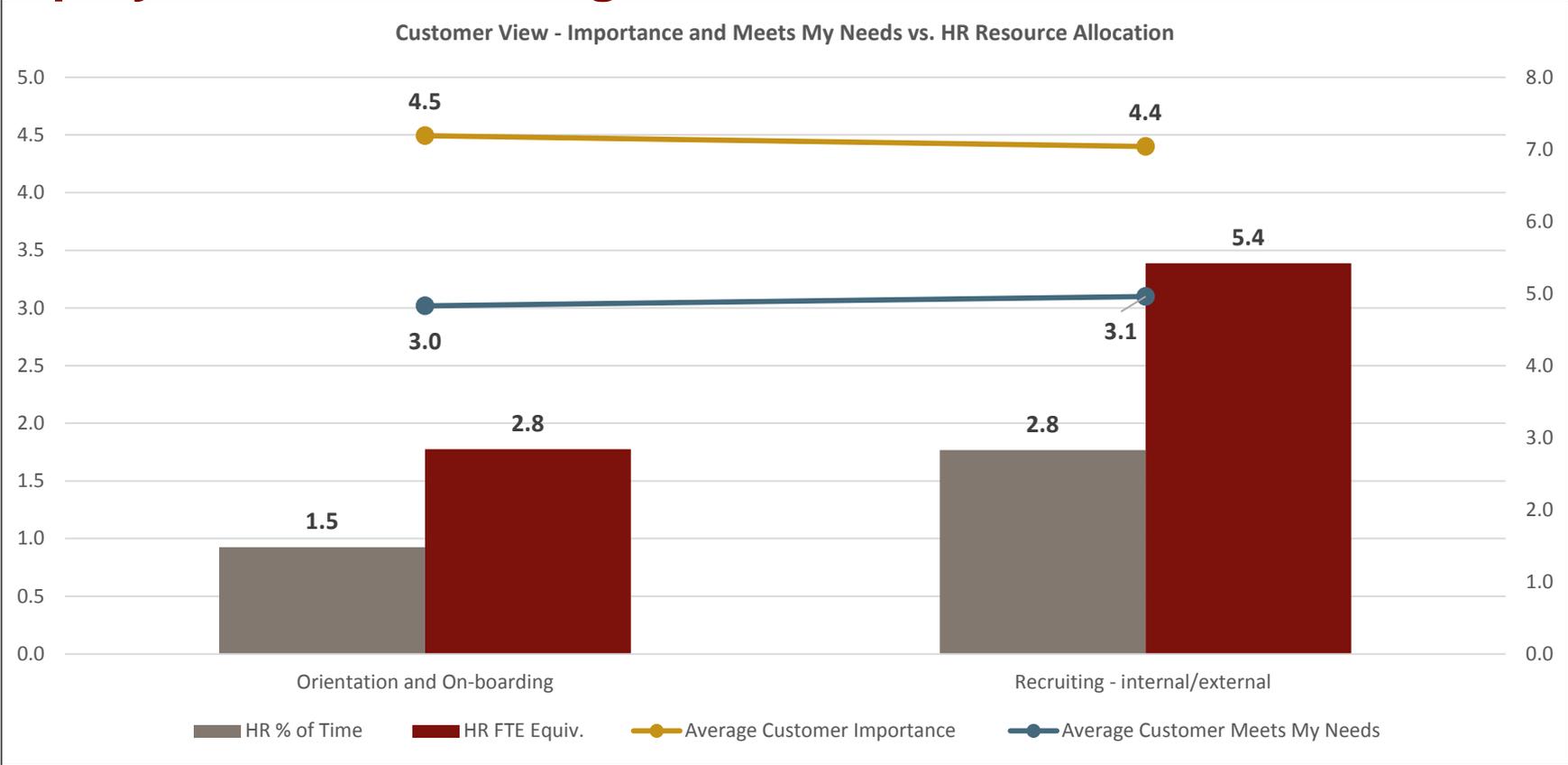
*Averages are taken only from non-neutral values for both importance and meets my needs

Employee Relations



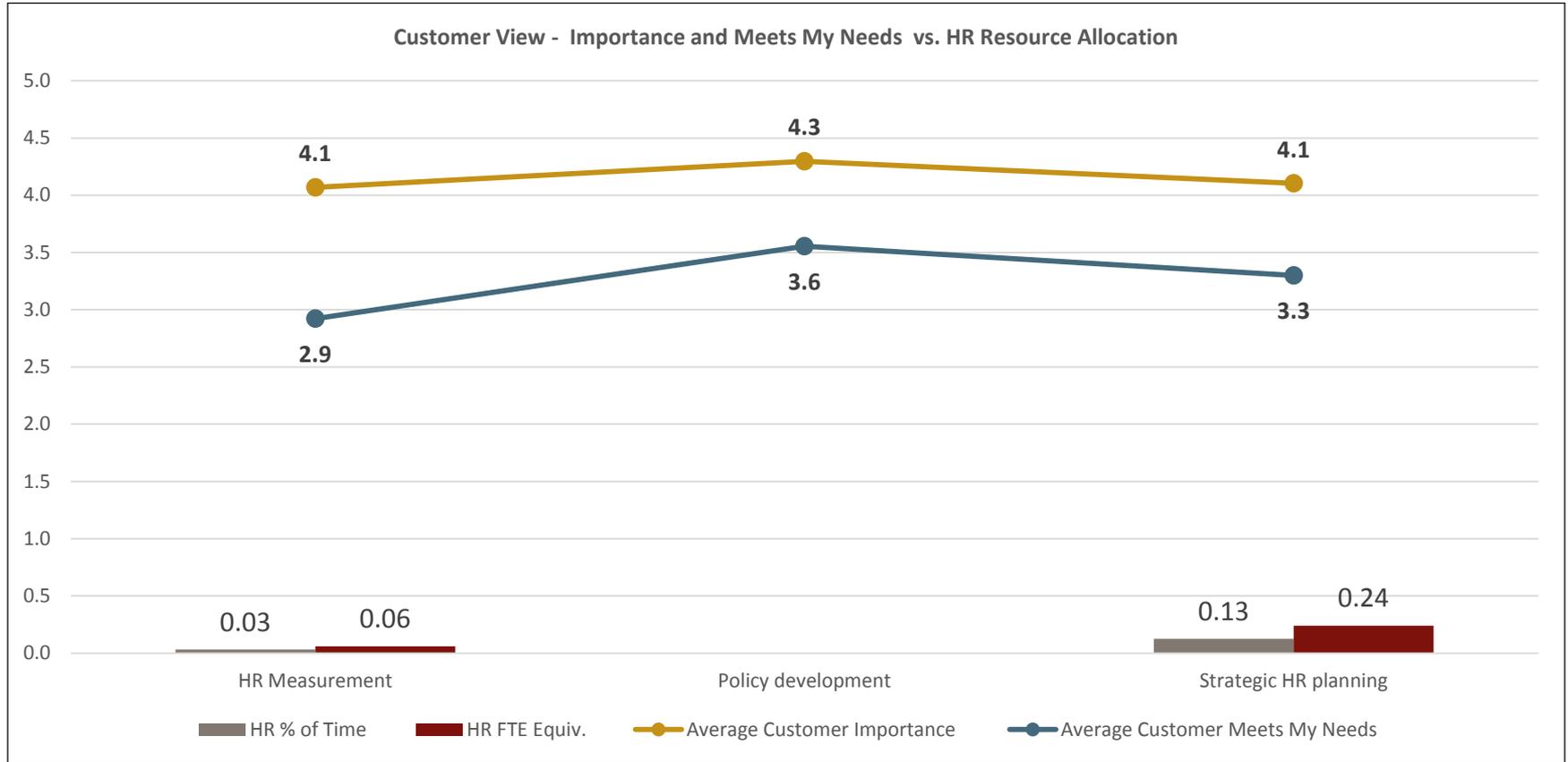
*Averages are taken only from non-neutral values for both importance and meets my needs

Employment & Recruiting



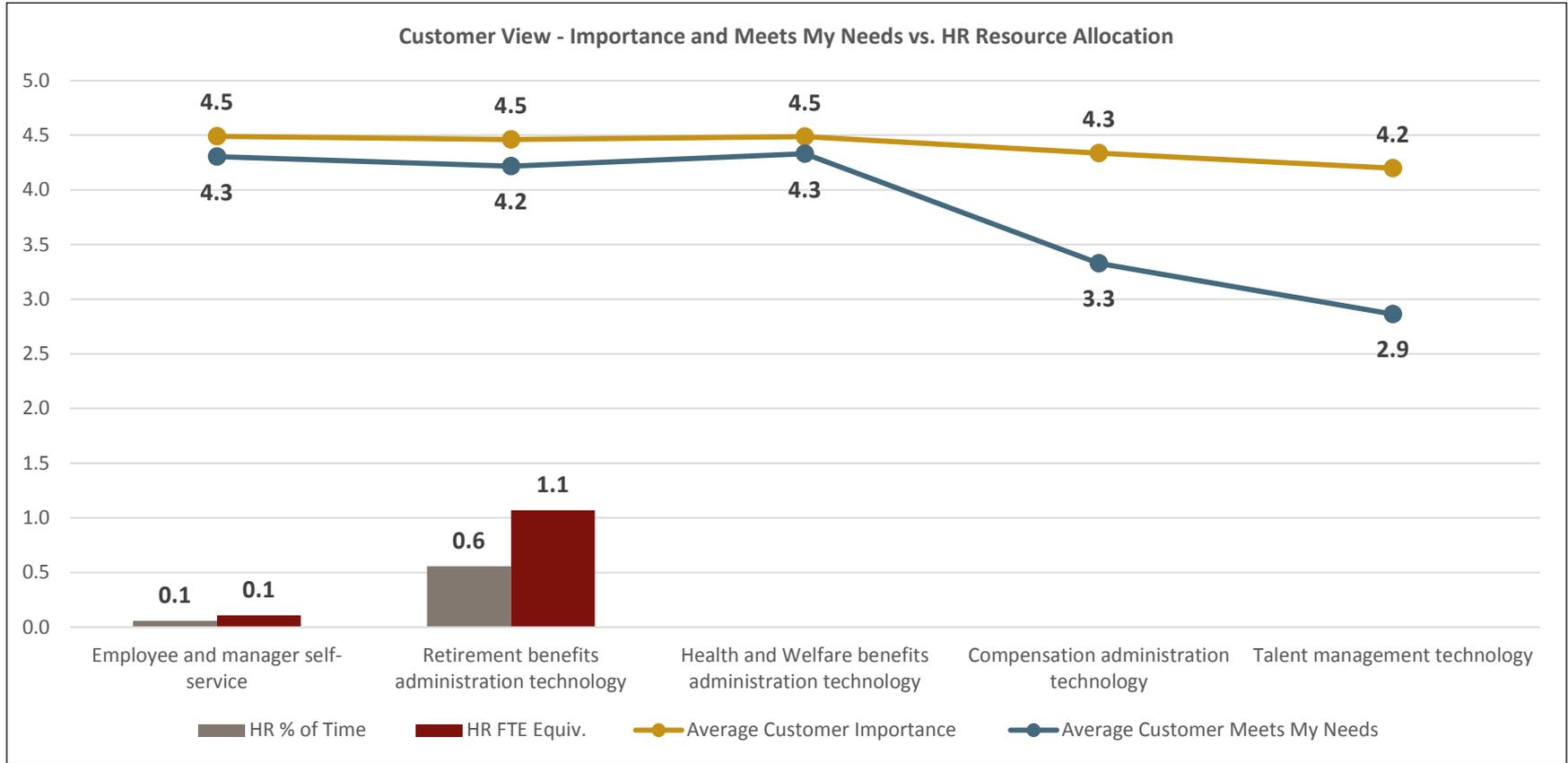
*Averages are taken only from non-neutral values for both importance and meets my needs

HR Strategy & Planning



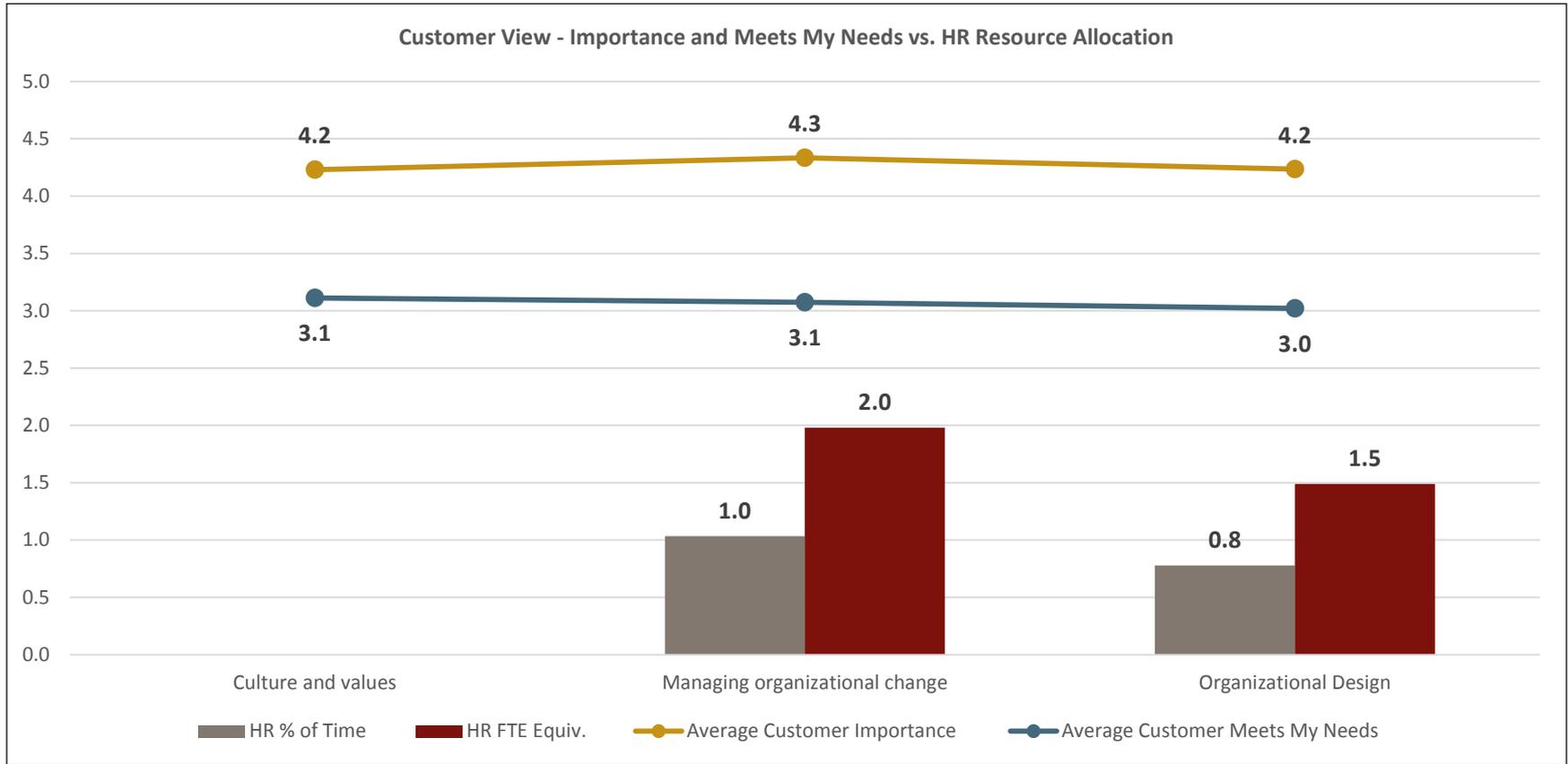
*Averages are taken only from non-neutral values for both importance and meets my needs

HR Technology



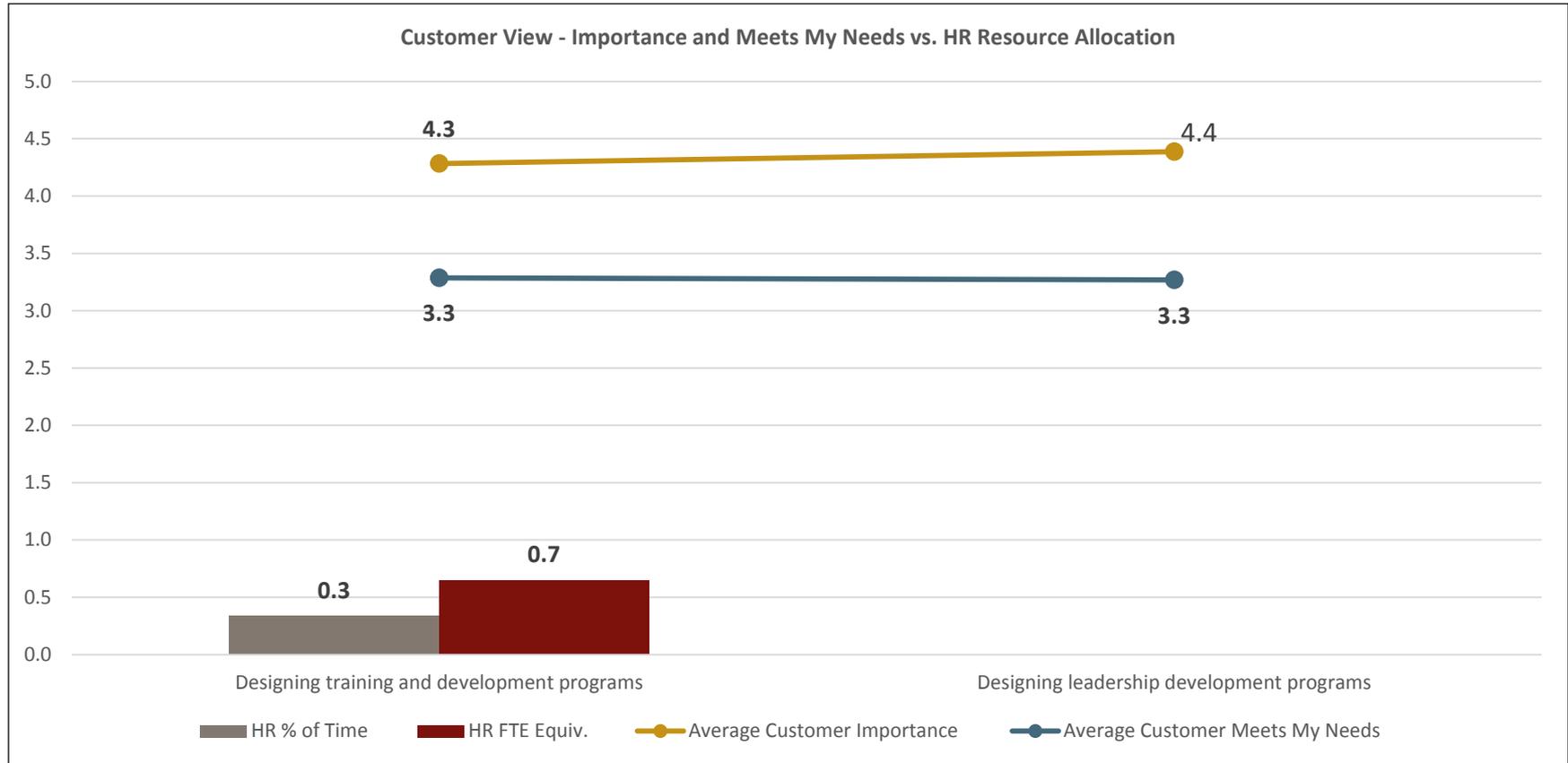
*Averages are taken only from non-neutral values for both importance and meets my needs

Organizational Development



*Averages are taken only from non-neutral values for both importance and meets my needs

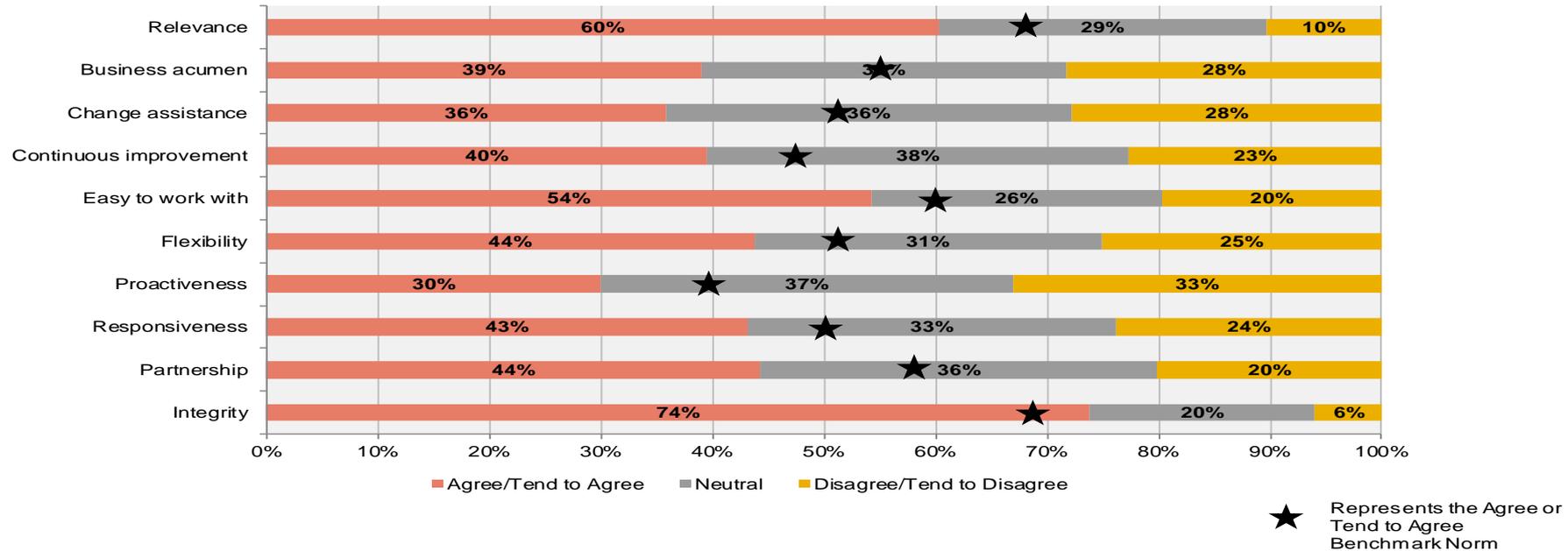
Training



*Averages are taken only from non-neutral values for both importance and meets my needs

HR's demonstration of fundamental HR attributes

- This chart illustrates how HR and HR Customers tend to agree or disagree when asked about HR's ability to deliver on select fundamental attributes
- The areas with the greatest agreement include Integrity followed by Relevance; the area with the greatest area of disagreement involves Reactiveness

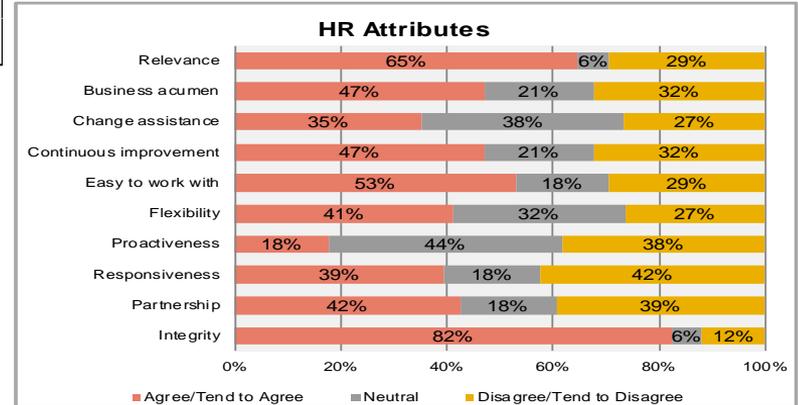


Data Cuts by Employee Type

- Executives
- Deans and Chancellors
- Faculty
- Exempt Staff
- Non-exempt (Support, Service, and Clerical Staff)

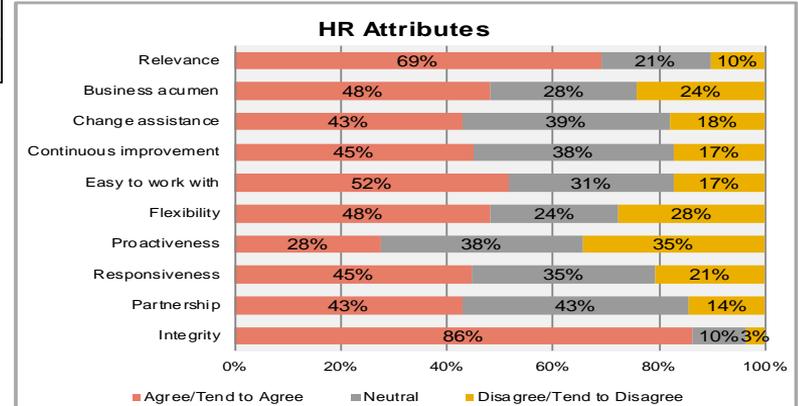
Dashboard – Executives

Function	Activity	Importance	Meets my Needs	Gap
Compensation and Benefits	Developing compensation strategy	91.2%	33.3%	-57.9%
Talent Management	Orientation and On-boarding	87.9%	31.3%	-56.6%
Compensation and Benefits	Designing compensation programs	85.3%	33.3%	-52.0%
Communication	Vision and Direction	73.5%	24.2%	-49.3%
Communication	Organizational performance	67.6%	21.2%	-46.4%
Talent Management	Poor performer management and remediation	76.5%	32.3%	-44.2%
Organization Effectiveness	Workforce Planning	59.4%	15.6%	-43.8%
Talent Management	Career and individual development planning	55.9%	12.5%	-43.4%
HR Technology	Talent management technology	70.6%	27.3%	-43.3%
Talent Management	Administering performance management	70.6%	28.1%	-42.5%



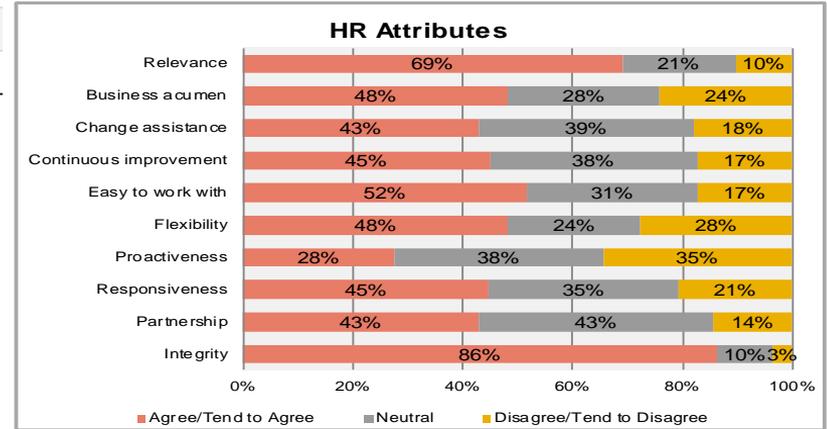
Dashboard – Deans and Chancellors

Function	Activity	Importance	Meets my Needs	Gap
Compensation and Benefits	Designing compensation programs	100.0%	31.0%	-69.0%
Compensation and Benefits	Developing compensation strategy	89.7%	24.1%	-65.6%
Organization Effectiveness	Workforce Planning	64.3%	3.6%	-60.7%
Organization Effectiveness	HR Measurement	64.3%	10.7%	-53.6%
Talent Management	Career and individual development planning	64.3%	10.7%	-53.6%
Talent Management	Identifying mission critical skills and competencies	75.0%	21.4%	-53.6%
Talent Management	Succession planning	67.9%	14.3%	-53.6%
Talent Management	Poor performer management and remediation	78.6%	28.6%	-50.0%
Talent Management	Creating training & development strategy	85.7%	35.7%	-50.0%
Compensation and Benefits	Administering compensation	89.7%	41.4%	-48.3%



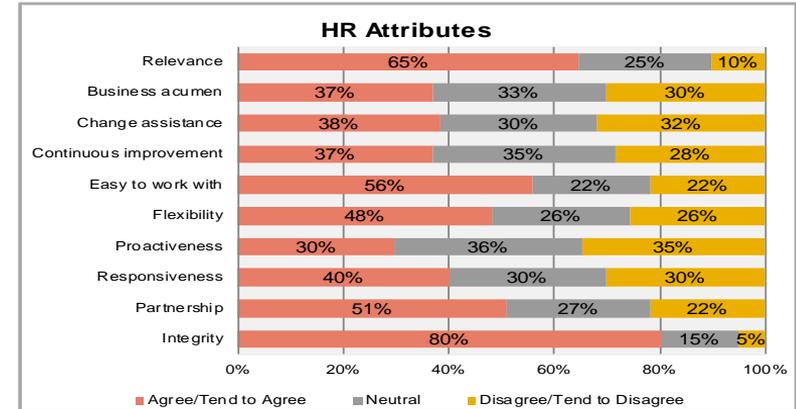
Dashboard – Faculty

Function	Activity	Importance	Meets my Needs	Gap
Compensation and Benefits	Developing compensation strategy	68.0%	20.8%	-47.2%
Compensation and Benefits	Designing compensation programs	72.0%	25.0%	-47.0%
Organization Effectiveness	Turnover analysis	69.6%	23.8%	-45.8%
Organization Effectiveness	Managing organizational change	73.9%	28.6%	-45.3%
Communication	Programs and policies	76.0%	33.3%	-42.7%
Organization Effectiveness	Workforce Planning	60.9%	19.0%	-41.9%
Communication	Culture and values	65.4%	25.0%	-40.4%
Compensation and Benefits	Managing retirement benefits	88.0%	47.8%	-40.2%
Talent Management	Supporting mentoring programs	54.5%	14.3%	-40.2%
Compensation and Benefits	Administering compensation	72.0%	33.3%	-38.7%



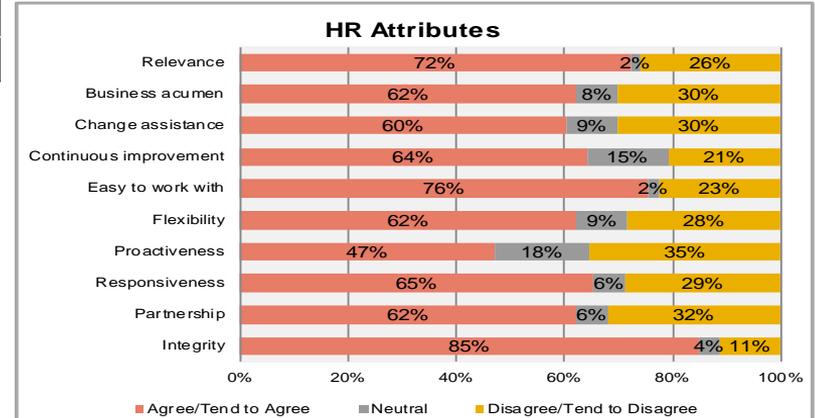
Dashboard – Exempt Staff

Function	Activity	Importance	Meets my Needs	Gap
Compensation and Benefits	Developing compensation strategy	90.5%	25.2%	-65.3%
Compensation and Benefits	Designing compensation programs	86.7%	23.2%	-63.5%
Talent Management	Succession planning	76.1%	15.8%	-60.3%
Communication	Vision and Direction	82.8%	27.9%	-54.9%
Compensation and Benefits	Administering compensation	90.9%	36.7%	-54.2%
Talent Management	Recruiting - external	86.3%	32.2%	-54.1%
Talent Management	Poor performer management and remediation	80.5%	27.3%	-53.2%
HR Technology	Talent management technology	70.3%	17.8%	-52.5%
Communication	Organizational performance	75.3%	24.5%	-50.8%
Talent Management	Orientation and On-boarding	83.1%	32.9%	-50.2%



Dashboard – Non-exempt (Support, Service, and Clerical Staff)

Function	Activity	Importance	Meets my Needs	Gap
Organization Effectiveness	Turnover analysis	64.8%	21.6%	-43.2%
Compensation and Benefits	Designing compensation programs	75.5%	32.7%	-42.8%
Compensation and Benefits	Developing compensation strategy	74.1%	32.7%	-41.4%
Communication	Programs and policies	92.3%	51.0%	-41.3%
Organization Effectiveness	Organizational Design	75.0%	34.7%	-40.3%
Communication	Vision and Direction	85.2%	45.1%	-40.1%
Talent Management	Orientation and On-boarding	77.8%	38.0%	-39.8%
Talent Management	Designing leadership development programs	74.1%	34.7%	-39.4%
Organization Effectiveness	Workforce Planning	63.0%	24.0%	-39.0%
Talent Management	Poor performer management and remediation	64.8%	26.0%	-38.8%



Focus Group Summary

- **Focus Groups were conducted October – December:**
 - The participants included HR employees and a cross section of select customers from all divisions
 - Focus groups were held on all 7 campuses
- **The focus group questions included:**
 - What does HR do well?
 - What can HR do to improve?
 - What suggestions / ideas do you have that would help HR better meet your needs?
- **Results were reported in aggregate, grouped by HR view and Customer view.**

Focus Group Participant Profile

Campus Group	HR	Customers	Total Participants
Bloomington	41	99	140
East	4	10	14
Indianapolis	15	81	96
Kokomo	4	19	23
Northwest	2	23	25
South Bend	3	14	17
Southeast	4	20	24

Total Participants
339

HR Focus Groups – What does HR do well?

HR View – Themes

- Customer service driven
- Approachable
- Care for customers / each other
- Strong support from UHR
 - Benefits, Employee Relations, OD/Training, HR Technology
 - Regional campus assistance
- Knowledgeable and willing to learn
- Know when to ask for help
- Benefits offerings and information provided
- Provide customers with information
- Offer good guidance / advice
- Dependable and responsive

Sample Comments

- “We genuinely want to help and will do whatever it takes.”
- “We are welcoming and make everyone feel they matter.”
- “We have a strong benefits package, a strength for attraction and retention.”
- “We partner with our customers and each other.”
- “If we don’t know something we will learn.”
- “We get tremendous support from UHR.”

Customer Focus Groups – What does HR do well?

Customer View – Themes

- Customer service driven
- Care for customers
- Strong support from UHR
 - Benefits, Employee Relations, OD/Training, Job postings
 - Regional campus assistance
- Responsive; but too few resources in some areas
 - Employment and Recruiting, Indianapolis Campus HR
- Competitive benefits offerings and information provided; vendor visits
- Training programs offered, especially leadership development

Sample Comments

- “HR really cares for people and is warm and welcoming.”
- “HR has high integrity and trust; follows through on commitments.”
- “They want to help, but they are so short staffed.”
- “HR website and quality of benefits information provided; we like campus vendor visits.”
- “I get good advice on how to handle difficult employee relations issues.”

HR Focus Groups – What can HR do to improve?

HR View – Themes

- Improve efficiency
- Better internal training for HR
- Clarify roles for Academic Affairs vs. HR; UHR vs. Campus HR
- Need an HR career path, more professional development
- Better performance management in HR; employee and leaders jointly working on development
- Define who is accountable for what
- Some areas in HR are understaffed
- Include RCs and all campuses in HR policy and program design
- Resolve conflicts between fiscal and HR policies

Sample Comments

- “There is lots of duplication everywhere; the same questions are answered routinely.”
- “There is turnover/movement and a lack of documentation on “how to” which makes training difficult.”
- “Need to better define the line between HR and academic affairs regarding faculty HR support.”
- “We need to fill HR jobs; too many open for too long.”
- “HR programs need to be jointly developed with campus input vs. pushed down and made to fit.”

Customer Focus Groups – What can HR do to improve?

Customer View – Themes

- Compensation
 - Job descriptions, job grading/reclassifications, market data, compression, inability to reward
- Recruitment
 - Position approval; minimum qualification screening; search committees; process delays
- New Employee Orientation
 - All IU approach with local touch
- Performance Management (Staff)
 - One university-wide system; no link between pay and performance
- Service Delivery
 - Direct contact with the source; more proactive; more strategic

Sample Comments

- “External hires are favored over internal; it’s easier to pay them at market; internal promos are not.”
- “There are pay/level inequities everywhere; not competitive.”
- “The reclassification process is a mystery; never consistent.”
- “It takes months to fill jobs.”
- “Search committee process is broken; no consistent methodology, unclear roles and guidelines.”
- “I’d rather go directly to the person with the answer, not redirected.”

HR Focus Groups – Suggestions to better meet your needs?

HR View – Themes

- Create a knowledge base or portal to share best practices
- Publish a ‘who to call for what’
- Provide more training and professional development for HR
- More cross-training (in HR and HR shadowing RC/Campus HR Reps)
- Better training for non-HR people doing HR related work; assign a buddy/mentor
- Quarterly or annual all HR session
- Communicate new HR people/role changes; do meet and greets
- Do more benchmarking to bring in best practices

Sample Comments

- HR knowledgebase or ticket system with FAQs. to share.”
- “Have UHR shadow campus RC people / cross train with UHR.”
- “Provide HR training / professional development i.e. SHRM.”
- “Hold an HR Session quarterly or 2-3 times per year.”
- “Better define roles, especially support for faculty HR issues and RC/campus vs. UHR”
- “There needs to be more collaboration within HR; too siloed.”

Customer Focus Groups – Suggestions to better meet your needs?

Customer View – Themes

- Recruitment
 - More sourcing and assessment support
- Learning and Development
 - More training offered (i.e. support staff)
 - Supervisory “How To” training
 - Career paths and development
 - Mentoring program
 - Learning Management System
- Governance: Roles / Decision Making
 - Define decision authority; no re-approval
 - Clarify roles (campus vs. UHR; academic affairs vs. HR; fiscal vs. HR policy)
 - Define process steps / guidelines
- One “HR System” across the organization, with some local flexibility
- Dedicated HR that understands our area and unique needs

Sample Comments

- “We want proactive help with candidate sourcing/strategy.”
- “We need more training for supervisors and clerical support.”
- “There is no career development or clear career paths.”
- “One system to track all required training, including compliance.”
- “We get caught being directed between local HR and UHR”
- “We want one enterprise HR system; there is no consistency and there should be; we are all IU.”

Questions

Remote participants can email the moderator at HR2020@iu.edu

Thank you to all participants for your feedback!

