



Background

Oregon State University (OSU) engaged the international consulting firm Baker Tilly to review OSU's delivery of human resources services. They conducted one-on-one interviews and focus groups with over 150 people across the university as well as an in-depth review of policies and procedures. Baker Tilly identified a set of challenges that included concerns with the organizational structure, information systems, several specific transactional processes, and a lack of clarity around roles and responsibilities.

The Baker Tilly review identified the student recruitment process (from initiation of the student posting → recruitment → hire) as inefficient and cumbersome, utilizing too many resources and having unacceptable cycle times. A project team was identified and assembled to restructure and streamline the student hiring process. As a result of their work, a long-term IT solution was proposed to further reduce the workload and improve efficiency while increasing transparency, consistency and communication. Through stakeholder outreach efforts, and increased collective bargaining agreement compliance issues, the business need to expand the scope of the IT solution to include Graduate Assistants became clear. Adding this population to the long-term IT solution will greatly benefit student, staff and faculty, while providing a basis for a system that will expand to other appointment types and processes in the future.

Business Problem

OSU hires and processes approximately 4,300 student appointments and 2,660 graduate student appointments each year. Current systems and processes have brought feedback that recruiting and hiring both hourly student employees and graduate assistant appointments is overly difficult and time-consuming. Specific issues and concerns are:

- Time from notice of the need to hire a student employee to integrating the new student employee into the workplace, including new hire paperwork and orientation is too long
- Inconsistent processes across colleges, units, and programs. Too many people needed in the process
- Highly manual process with high level of error rate in offer letters and appointment setup
- Too many steps in the process

Proposed Solution- IT Appointment Database System

The Appointment Database System is an IT solution that will support the following components of the recruitment and hiring process:

- Position request input from the Supervisor or designated representative
- Routing for budget approval and HR or department liaison to create recruitment system posting
- Upload of applicant information from recruitment system
- Hire request information following the recruitment and selection process
- Eligibility and restricted list verification
- CHC/MVHC indicator that prompts distribution of email and forms using DocuSign followed by manual entry into the system of results to prompt next steps
- Creation of offer letter and work assignment form that can be routed and signed via DocuSign
- Welcome email and hiring paperwork using DocuSign
- Real-time integration with Banner and NoliJ

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- Enable visible tracking and dashboard displaying the status of hires for all stakeholders.
 - Phased growth and approach starting with student hourly appointments and graduate student appointments with subsequent phases being classified and unclassified appointment types

IT Solution Platform

IT platforms that are currently used by units across the university were considered, including Salesforce, Ideal Logic and a homegrown system to be built by Central IT. In full consideration of the summaries of proposed solutions provided, the Project Sponsors determined that Salesforce would best meet the needs of the university for this project. This approach is fully endorsed by VPI&T Lois Brooks for security, robustness and alignment with university technology directions.

Salesforce Benefits and Key Features

- Salesforce is an industry best-in-class enterprise level System of Engagement platform. It has the technical infrastructure, security capabilities and extensive feature set to increase university business process efficiency, reduce overall expenses and improve data quality. That said, it does not do any of this out of the box. In order for our Salesforce implementation to take us to the next level, we have to own feature development and improvement. Once we invest in the development and refinement processes, we will be able to own our own digital infrastructure and not be at the financial and time whim of software companies that charge for each support ticket, customization and integration.
- Key Salesforce features:
 - Robust and broad integration options
 - 'Clicks-not-code' configuration development
 - Extensive app store for extending feature set
 - Multiple workflow and trigger options
 - Many built-in features such as: campaigns, contracts, ticketing system, communities (portals), SSO, email/notification automation, mobile, reports and dashboards.

OSU Experience with Salesforce

OSU has a widespread, strategic use of Salesforce to manage college differentiation and key business processes. Both undergraduate and graduate admissions are done through Salesforce, and the entire graduate student administrative lifecycle is managed through the Graduate Education Toolkit, powered by Salesforce. OSU has recently adopted Marketing Cloud for recruitment activities, extending our use of Salesforce to support better outreach and metrics university-wide.

Salesforce can be leveraged through a 'shared use' profile, allowing segmented use within a single instance. This optimizes licensing, management and interoperability costs, while allowing differentiation of business functions and finely-tuned access controls for sensitive data. The following units are using or preparing to use the 'shared' Salesforce platform, as will this project:

Units on campus using the Shared Use Org:

- Graduate School
- College of Engineering
- Student Health Services
- Enrollment Management
- eProcurement

Units on campus currently doing development in Shared Use Org:

- International Programs
- Academic Technology
- College of Education
- Honors College
- Extension

Additionally, the following units have separate instances of Salesforce to manage student lifecycles:

- Honors College
- College of Business
- Cascades Campus
- College of Public Health and Human Sciences

Timeline

The Project will commence in November 2017 with implementation in Spring 2018 for a go-live of the system for Summer 2018 appointments.

Stakeholders

Project Owner: Donna Chastain, Interim CHRO

Project Sponsors: Mike Green, VPFA

Toni Doolen, Dean-Honors College and College of Education

Lois Brooks, CIO

Donna Chastain, Interim CHRO

Tammy Jennings, Director of HR Business Partnerships

Project Manager: Heather Riney, Interim HR Business Partner-Forestry & CEOAS

Project Team:

Linda Sather, Associate Director of HR Systems & Technology

Shaun Bromagem, Finance and Accounting Manager-BEBC

David Barnes, Human Resource Manager-Cascades Campus

Kristin Rifai, Administrative Manager-Department of Crop and Soil Science

Tricia Gerding, HR Business Partner-AABC

Project Technical Team:

John Henry, Director of IT-Grad School

Jared Kosanovic (Integration)

Tim Harris (Banner/EPAFs)

Scott Campbell (PeopleAdmin/Restricted List)

Hollie Pitts (DocuSign)

Lakshmi Srinivasan (Salesforce)

Project SMEs:

Experts from across the university will be identified to participate in work sessions and testing efforts that are involved throughout the recruitment and hiring process for students and GAs.

Project Objectives

The transition team will convene stakeholders across the university, including representatives from colleges/units, human resources, information technology, and payroll in a project team or subject matter expert work groups. These groups will complete the following project objectives:

- Create and provide feedback on a process map that demonstrates a diagram of processes, systems and stakeholders involved in the system and the workflow associated therein
- Create a system that will reduce the number of systems a user has to interface with in order to complete the recruitment and hiring process
- Allow for a dashboard for stakeholders to review the status of a recruitment, identifying next steps and approximate process time expectations
- Develop a plan which includes testing, real-time feedback and builds in a process improvement cycle, as well as detailed communication plan for implementation to various stakeholders
- Present new system capabilities, projected cost and resources, communication and implementation plans to Project Sponsors (Mike Green, Toni Doolen, Donna Chastain, Lois Brooks and Tammy Jennings)
- Build the initial system with the capacity to expand to additional appointment types and functionality
- Final plan and system development to be completed and ready for implementation by Spring of 2018 to go live for Summer 2018 appointments