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HIGHER COLLEGES OF TECHNOLOGY

# Human Resources Action Plan Report

Higher Colleges of Technology

**Debbie Kirkham**  
Client Partner

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# Executive Summary

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## Realise the Strategic Vision

Since becoming an Ellucian Banner client in 1995, Higher Colleges of Technology (HCT) has used Ellucian technologies to achieve significant progress in many areas. Ellucian has maintained an ongoing commitment to HCT by continuing to develop powerful new functionality, enhanced capabilities and service offerings designed to improve HCT's performance and efficiency. A key goal of the Action Planning engagement is to identify the gap between the value Ellucian solutions can provide HCT and the value HCT is currently realising. To determine this gap, Ellucian relies on two sources of input: the HCT strategic plan and input from the onsite discovery visit.

The technology department engaged Ellucian to evaluate the overall use of Banner Human Resources by institution staff and determine where opportunities exist to increase efficiencies and maximise return on investment. The primary objective in conducting the Action Planning evaluation process is to align the institution's goals with actionable initiatives that will result in increased productivity and resource savings over time.

Key outcomes of the Action Planning process are to:

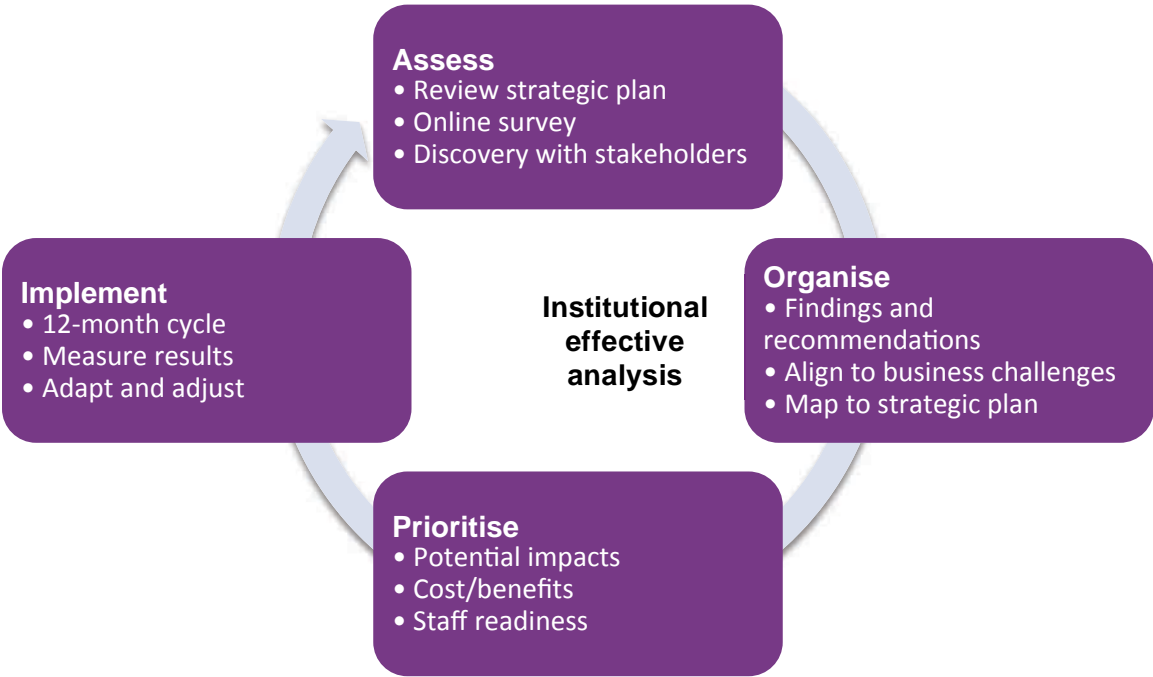
- Improve utilisation and efficiencies of the Ellucian Solutions.
- Explore new solutions that will enhance staff, faculty and ultimately student success.
- Establish a support structure to sustain success.

On May 30<sup>th</sup> 2016, Higher Colleges of Technology's Client Partner, Debbie Kirkham, facilitated an onsite Action Plan discovery interview with executives and key departmental users of Ellucian solutions. The information obtained from the interviews, as well as relevant input from HCT's strategic plan has been evaluated. The findings, prioritised recommendations and a suggested timeline designed to maximise use of the Banner Human Resources is detailed in this report. Several high-level observations from these engagements include:

- Some users interviewed are not aware of key functionality that exists.
- Many processes are paper-based with minimal use of delivered rules and utilization of existing functionality to automate
- There is a need for greater decentralisation of knowledge and cultivation of HROs within each campus.
- Shadow systems still exist across the institution.
- The Ellucian delivered reports are not well known to most staff.
- Staff has a strong reliance on IT for functional modifications and ongoing support.

The Action Plan findings and recommendations in this report are focused on strengthening operational excellence and improving the administrative and employee experience to support HCT's continued growth and success. Ellucian appreciates the opportunity to collaborate with Higher Colleges of Technology throughout the Action Planning Process and is confident that this engagement will provide a roadmap that fosters institutional effectiveness and aligns technology with HCT's goals.

**The Action Planning Process**



## Higher Colleges of Technology's Strategic Goals

The following are specific goals and initiatives identified in the institution's Strategic Initiatives Charter that can be supported by maximising the Ellucian enterprise education platform. Ellucian's solutions are intended to support the achievement of these goals using the most cost effective and integrated technologies and business processes. Provision of quality and efficient administrative services with effective governance are primary goals of HCT supported by specified initiatives and related activities.

Higher Colleges of Technology Initiatives		Ellucian Recommendations
<b>Initiative 10</b>	Enhancement of faculty professional development programme	<b>Implement and maintain an effective talent management programme including the ability to deploy performance reviews, establish related development plans and provide professional development opportunities for Faculty.</b>
<b>Initiative 16</b>	Establishment of strategic recruitment process for employees	<b>Brand and improve sourcing, standardise candidate assessments, streamline recruiting processes supported by strong analytics capabilities.</b>
<b>Initiative 17</b>	Establishment of engagement scheme throughout employee career	<b>Implement and maintain an effective talent management programme ensuring that new hires are engaged in smooth on-boarding processes and ensure that employees are engaged throughout their careers supported by recognition and feedback and strong analytics capabilities to measure engagement and satisfaction.</b>
<b>Initiative 18</b>	Institutionalisation of structured career progression system for all employees	<b>Implement and maintain an effective talent management programme that provides for career paths, employee reviews linked to professional development opportunities and alignment of goals.</b>
<b>Initiative 19</b>	Creation and communication of organisation-wide policies and guidelines	<b>Engage in activities which give Higher Colleges of Technology Human Resources a 360 degree view of the policies, tasks, people and technologies needed to perform a business process.</b>
<b>Initiative 21</b>	Review of organisation structure and governance model	<b>Update the organisational structure and increase organisational effectiveness and efficiency by improving how people, processes and technology interact across the institution for the Human Resources function and to support achievement of the strategic vision.</b>

# Findings and Recommendations

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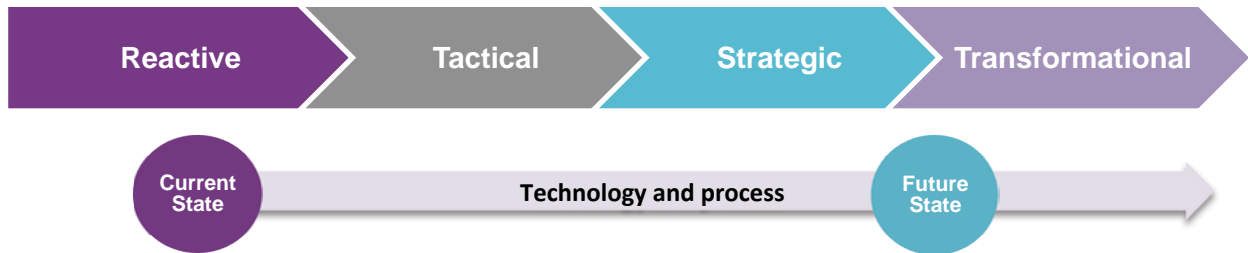
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# Onsite Discovery Results

During the onsite discoveries specific business challenges were discussed with participants. This section provides additional detail about the results of the onsite discoveries as well as Ellucian’s recommended initiatives for success in addressing the findings.

The recommendations are focused on solutions that result in increased staff efficiencies and automation that will support a culture of continuous process improvement. The objective is to provide actionable initiatives that will focus efforts on enhancements that are directly aligned with institutional goals. These recommendations are based on years of best practice experience with hundreds of institutions, such as HCT, in combination with the information gathered from the survey and during the onsite discoveries.

Ellucian’s goal is to help HCT capitalise on available solutions to achieve institutional excellence and ultimately student success. By addressing the findings as part of a holistic Action Plan, HCT will be better prepared to face today’s emerging trends and will be more agile to handle tomorrow’s unique challenges.



## Create a culture shift

In the face of dynamic change, your faculty and staff must learn to adapt quickly and act strategically in order to accelerate institutional effectiveness and achieve results at your institution. At the Higher Colleges of Technology there is a reliance on IT to meet Human Resources functional requirements which has led to modifications as Banner add-ons. This has limited the capacity to implement new capabilities and processes to improve operational effectiveness.

Today’s higher education administrators face increasing demands to be more effective and accountable when managing their institution. It is important to build a culture of proactive leadership based on individual ownership and accountability.

### Findings:

- There is a strong reliance on IT to meet Human Resources functional requirements that has led to modification to Banner pages as add-ons including the creation of additional Banner pages, modifications to Employee Self Service and the development of approval processes outside of Banner.



- There is no formal training on Banner except for informal training at the departmental training especially for New Hires. There is no on-going training on new releases or enhanced functionality so that end users are not current on Banner functionality. This appears to have led to IT developed modifications/add-ons or IT supported processes.
- Baseline reporting is not being utilised and most reports are custom reports and are created and generated centrally using a number of tools.

### **Recommendation:**

There must be a culture shift for Human Resources to take ownership of their processes, system functionality and maintain up to-date knowledge of functionality available to them.

- Banner Human Resources training is recommended for both new and current employees including centralised HR staff and decentralised HROs and that recurring training be deployed on a timely basis. IT is recommended that HCT explore and formalise options for ongoing functional and technical training. There are 5 Essentials and 2 Fundamentals named user seats for the **Ellucian On-Demand Subscription Library (ODSL)** provided as a benefit of the Ellucian Advantage maintenance programme. Additional named user seats are available through a variety of “Knowledge Pro” subscription offerings based on duration and number of seats requested. A site coordinator would manage the allocation of named users.
- HCT power users should be encouraged to join and participate in Ellucian eCommunities. eCommunities provides an online forum where customers, partners and Ellucian employees can share experiences, ask questions, find answers and build a collaborative and informed community. Regional conference participation is also encouraged to connect in person with peers for the reasons described above, in addition to benefitting from rich presentations from both Ellucian and customers to share best practices and the latest innovations.  
<http://www.ellucian.com/Insights/Community/>
- In addition to eCommunities participation, establish access to Banner product documentation for current releases (including list of available reports) to users in a central location and provide orientation for all Banner users to benefit from accessing for self-help when possible.
- HCT, as an institution, undertake, develop and execute a **comprehensive Reporting Strategy** that brings together the universal needs of Banner users as well as the specific needs of Human Resources in order to most efficiently maintain and upgrade reliable reporting environments

### **Future State:**

By creating this culture shift at HCT you will be positioned for the rapidly evolving future of human resources management in education—with more efficient processes, improved employee knowledge and morale, reduced modifications and required support and noticeable campus-wide progress toward priorities and business goals.

## Automate Critical Business Processes and Increase Efficiencies and Improve Automation

During the onsite assessment it became apparent that the Higher Colleges of Technology are not taking full advantage of existing and new automation features and instead are relying on manual, paper-based processing efforts and/or IT developed processes to accomplish critical tasks.

### Findings:

- It appears that some approvals for HR actions have been developed outside of baseline Banner functionality.
- Many processes are paper and email based. Position Definition is owned by Human Resources and Position Budget is owned by the Budget Office. A new position request requires manual steps including taking snapshots of the organisation structure and emailing requests and manual reviews and approval.
- Standard competencies and objectives are assigned to individuals and goes through a review process. This is managed through an in-house system. Resumes and CVs can be uploaded into the system.
- Termination and final clearance is for the most part a manual process.
- Onboarding typically involves an on-site orientation.
- The current recruiting functionality is not integrated with Banner and is a separate application that must be maintained.

### Recommendations:

- Engage **Ellucian Consulting Services** to provide **training and consulting services for Banner Workflow** functionality to provide HCT the opportunity to optimise and automate many manual processes to increase their efficiency and reliability and optimise the use of resources. Identify two high priority processes for which to model and implement a workflow as part of the engagement, namely:
  - Position Requests
  - Terminations

Apply new Workflow knowledge to optimise and automate other manual processes. A departmental business analyst role in Human Resources is an excellent candidate for being responsible for Workflow modelling.

- Implement an integrated talent management solution, with a priority of supporting HR staff with integrated and productive tools to manage the complete employee lifecycle. The Performance module can help you identify and track competencies of high-performing faculty and staff, providing better critical assessments across key metrics and provide career paths and development plans. It also includes succession planning that can help you engage your top performers and make sure that the right people are promoted to the right positions. Ellucian Talent Management Recruiting and Onboarding can streamline employee recruiting and the transitioning of new employees to their first day of work.

### **Positive Business Outcomes:**

By enhancing the use of existing solutions numerous automation features can be leveraged to cut down on staff's cumbersome and often prone to error, manual processes. Automation provides a more repeatable, reliable and efficient review and approval process.

A targeted plan to help optimise the investment in Ellucian technology, streamline campus-wide workflow and automate strategic business processes will enable HCT to reduce the total cost of technology ownership and offer better service to employees.

Investment in additional functionality such as Ellucian Talent Management will provide integrated and productive tools to manage the complete employee lifecycle

## **Assess Employee Self-Service**

As the generational and cultural shift moves toward 24/7 self-service offerings, it is increasingly important to provide high-quality self-service tools to staff and faculty. To enhance operational excellence, Higher Colleges of Technology must deliver online access to virtually any information constituents need at any time of day or night.

Ellucian's self-service solutions empower HCT to offer a full spectrum of online services through innovative business workflows and sophisticated forms. HCT has modified Employee Self Service and during the evaluation process it was unclear on the degree of adoption and utilization of baseline Employee Self Service.

### **Findings:**

- HCT has modified the pay advice.
- Temporary employees enter time on a paper timesheets as opposed to being entered online through Web Time Entry.
- HCT has modified Employee Self Service e.g. employees can update employee information such as certifications.
- HCT has developed in-house functionality to support Leave Management and Education Fee management.

### **Recommendations:**

- Review the capability of Employee Profile under Banner XE. For example, this release provides the ability to customise and brand pay advices and generate PDFs eliminating the need to support an ongoing modification.
- Assess the Middle East localisations for Banner Leave Administration and the Education Fee Administration (EFA) product that localises Banner™ Human Resources for the HR practices followed by the Middle East clients.
- Implement an integrated talent management solution, with a priority of supporting HR staff with integrated and productive tools to manage the complete employee lifecycle. Ellucian

Performance equips HR with a comprehensive solution to allow employees to manage their careers e.g. create career paths and update their on-line resume.

**Positive Business Outcomes:**

When reliable self-service solutions are staff and faculty no longer need to wait for assistance and satisfaction will be significantly improved at HCT.

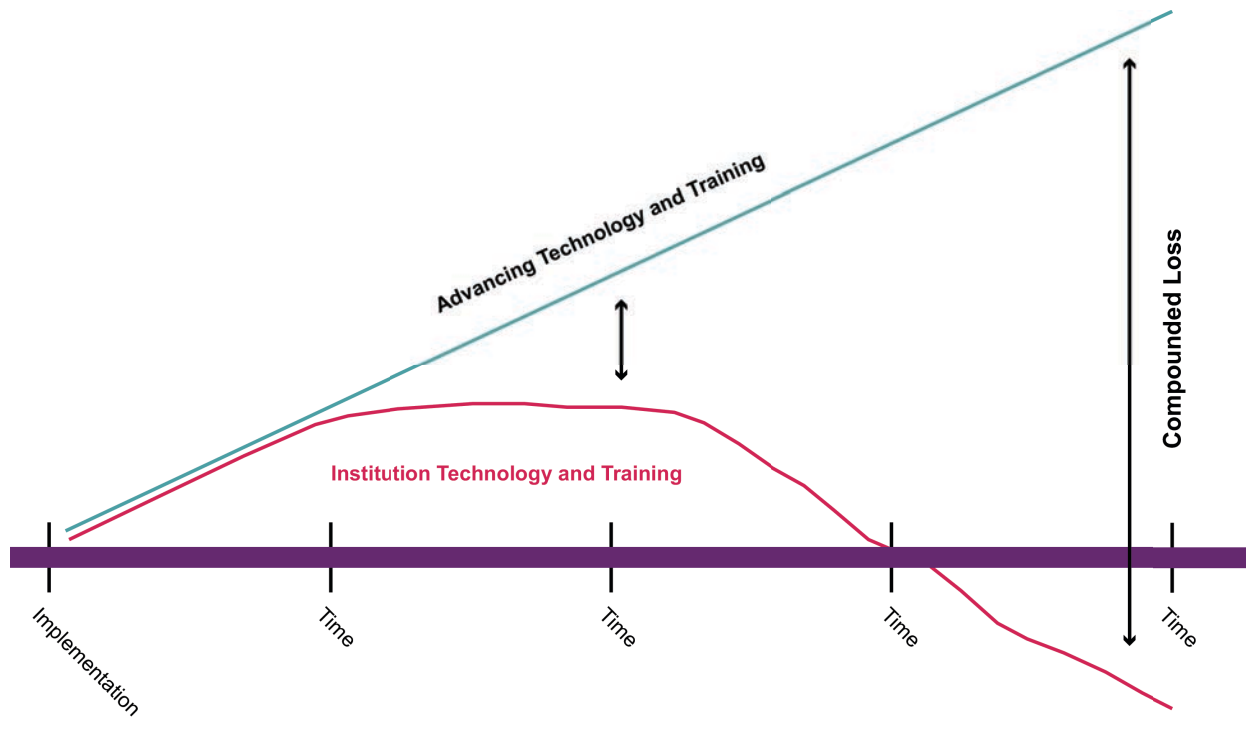
Adopting baseline functionality reduces the need to develop and support modifications on an ongoing basis. Capitalising on self-service solutions is also an effective way to decrease demands on administrative staff by reducing the number of calls and visits for routine requests. This enables staff to focus on individual students and more strategic initiatives that will increase institutional efficiency and enable student success.

## Optimise Use of Existing Functionality

Higher Colleges of Technology and Ellucian have been partners for 21 years. During that time Ellucian has continued its commitment to providing expanded capabilities and campus-wide solutions which will better serve HCT. At the same time natural events such as staff turnover, growing competition within higher education and expectations for more analytical reporting create the need for HCT to leverage more efficient and effective ways to use existing and emerging Ellucian solutions.

The evaluation determined that Human Resources is not currently taking full advantage of baseline capabilities and inherent system-wide integration and tools.

### Progress in Technology



The above graphic represents a challenge that many institutions face as time elapses since the original implementation. Staff turnover, lack of documented procedures, and decreasing institutional/departmental knowledge about system functionality all contribute to an increasing gap in understanding of available system features which leads to underutilization of the software. Many Ellucian clients use the Action Planning process as a means to refocus on modernisation of the software and increasing the effort to provide end user training in order to achieve improved use of available capabilities.

Ellucian's proposed methodology for improving utilisation and effectiveness of the existing solutions is a prescriptive approach that involves bringing experienced Ellucian subject matter experts onsite to consult and implement business processes using available functionality with a commitment to focus on current industry best practices.

### Findings:

- There is a reliance on paper documents for employee actions. Transactions originate at one of the 17 distributed campuses but are entered into the system centrally. The HR team wants to ensure that there is an audit, that review and approvals occur and the segregation of duties is maintained.
- Campus HROs' knowledge of Banner and access to information appears to be limited.
- There is a desire to streamline, enhance and reduce the time and effort to support the payroll processes. HCT currently supports 5 pay IDS which each include 4 employee classes. Payroll cut-off is on the 15<sup>th</sup> and Payroll then starts processing, runs over 50 checks and distributes pay on the last day of the month. In addition, there is a test run to a Finance test environment prior to the actual run to the Production Finance System. This is a legacy process.
- At HCT a Regular FT employee is typically assigned to one position, however, HCT has many dotted line reporting structures. The desire is to assign multiple supervisors to one employee.
- The current utilisation of Banner Approval pages requires significant manual effort to maintain as roles change at the institution.
- Employee Leave management has been customized to an extent. As well, employee leave accrual calculations do not appear to be pro-rating as expected.
- Temporary assignment staff are entering time worked on paper timesheets.
- Budget information is currently maintained on spreadsheets and uploaded to Banner using a delivered process.
- HCT is considering tracking academic ranking.
- HCT employees many adjunct/part-time Instructors. Typically, they are retained on a semester basis and in many cases compensated based on course credits. HCT has a desire to evaluate best practices and ensure that adjuncts are paid appropriately.

### Recommendations:

- A redeployment approach of business processes is needed in the **Banner Human Resources** areas. Ellucian's **Revitalisation Services** are designed to provide HCT with a comprehensive, holistic series of strategic, focused consulting services that include business process modeling, process improvement consulting, applied process-based training and performance measurement, centered on improving HCTs effectiveness in using the Banner Human

Resources system. As part of this engagement all supplemental processes and customisations should be thoroughly assessed so that features of baseline Banner and Self Service can be leveraged to increase efficiencies and improve effectiveness. Some particular areas from the discovery visit that were found to require such focus include but are not limited to is position management, employee actions and payroll.

- Anticipating certain outcomes from and to be scheduled after, the recommended Human Resources Revitalisation Services, engage **Ellucian Consulting Services** to provide **training and consulting services** in support of implementing specific existing **Banner Finance** functionality to maximise use of Banner and avoid unnecessary manual steps or additional process time:
  - Electronic Personnel Action Forms (EPAFs)
  - Faculty Load and Compensation (FLAC)
  - Faculty Administration
  - Salary Planner

**Positive Business Outcomes:**

The recommendations are focused on taking actions that will result in increased efficiencies and automation that support a culture of continuous process improvement. By discovering new efficiencies, eliminating inefficiencies and aligning appropriately supported business processes with strategic initiatives, HCT can more successfully focus resources on achieving desired goals.

# Let's Get Started

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## Next Steps

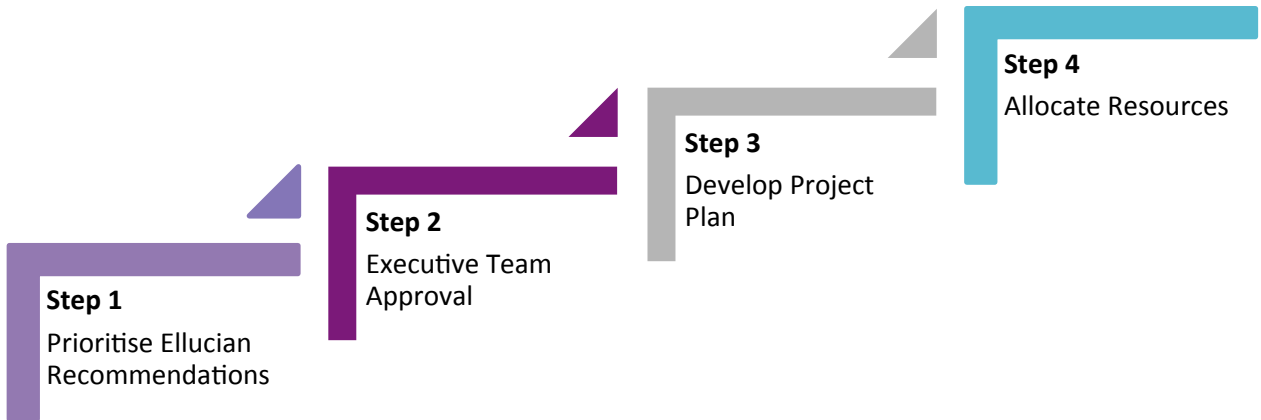
In light of the development of the Strategic Initiatives Charter and the challenges in the Human Resources area the time to evaluate and improve business processes has never been more critical.

Ellucian believes that executing the Action Plan presented to Higher Colleges of Technology will result in substantial staff productivity gains and an enhanced and more personalised user experience for staff.

Next steps to begin driving results are:

- Step 1:** Prioritise recommendations and update the timeline
- Step 2:** Finalise the plan for approval
- Step 3:** Ensure that the 2016-2018 projects have executive champions
- Step 4:** Allocate resources, build project plans and execute the plans

Ellucian welcomes the opportunity to partner with HCT to define and achieve best-in-class models of operational excellence and student success.





## Timeline

Based on the Ellucian findings of the HCT engagements, Ellucian recommends the following optimization timeline to support these projects. This timeline is a living, breathing document and the project manager will work closely with all key stakeholders and leadership to adjust as necessary to ensure institutional success.

# Appendix

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## Solution Descriptions

During the Action Planning process at HCT, Ellucian uncovered several opportunities where investing in new solutions can deliver significant return on investment over the course of HCT 2.0 transformation. Descriptions of the most strategic recommended solutions have been provided below. Please contact Debbie Kirkham, Client Partner, for additional information.

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## Solution

## Benefits

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### **Banner Workflow**

Banner Workflow spans the whole enterprise, not just one functional area such as Human Resources or Finance. Being an independent workflow solution versus an embedded workflow solution, third party applications can be incorporated into the business process being modeled and implemented. The functional silos are truly broken down with Workflow, allowing you to operate in a more efficient manner and to view business processes at an institutional level versus a department or functional level.

The right software can play a critical role in overcoming the barriers to implementing and maintaining an effective talent management program. The Ellucian Talent Management Suite helps institutions manage the complete employee lifecycle, from recruiting, learning, and performance management, to organizational and succession planning.

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### **Ellucian Talent Management Suite**

This fully-integrated Software-as-a-Service (SaaS) offering is easy to implement and includes a collection of modules which can be licensed together or separately, so that the institution can fully tailor the talent management system to fit needs.

#### **Recruiting**

The Recruiting module can help manage applicants more successfully and identify the right candidate from within or beyond the institution. Social recruiting capabilities foster collaboration among the recruiting teams for faster, more accurate candidate review.

#### **Learning**

The Learning module can help deliver highly-targeted training, ensuring that competency and skill gaps are actively addressed while helping create greater productivity across departments.

#### **Performance**

The Performance module can help identify and track high-performing faculty and staff, providing better critical assessments across key metrics. It also includes succession planning that can help engage top performers and make sure that the right people are promoted to the right positions.

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## Ellucian Revitalisation Services

As institutions are being tasked to “do more with less” there is a critical need to maximise the use of available baseline system functionality, minimise business process inefficiencies and promote simplified and consistent training for system users. Examples of common characteristics of institutions that would benefit from Revitalisation Services are Ellucian clients utilising the Banner solution five or more years ago, little ongoing training of new functionality, changing business goals, new executive leadership, or state mandates for cutting costs.

A glance at some components of Ellucian Revitalisation Services demonstrates the value this engagement can bring to the institution.

- Business Process Modelling
- Process Improvement Assessments and Applied Training
- Performance Workshops

Strategic Advisory Services

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## Ellucian Education Services

Technology offers great potential to decrease workloads and increase productivity – but only if functional users are leveraging its full capabilities. Today with tight budgets and multi-tasking employees, finding the time and resources to keep your workforce at peak skill levels isn’t always easy.

Ellucian Education Services takes the burden of delivering training off your institution and it provides flexible training options that can be tailored to meet your users’ individual needs and timelines, cost effectively. Who knows better how to maximise every ounce of functionality in your solutions than the company who made them?

Our comprehensive Education Services range from basic to advanced courses for technical, functional and managerial personnel.

Our experts have many years of experience in delivering hands-on, best-in-class training to users at higher education institutions. They are dedicated to providing you with ongoing learning opportunities and specialised offerings.

We offer four training options:

- **On-Demand Subscription Library** provides short training segments so functional users can quickly master the software they use to do their jobs, without leaving their desks - which means more time for them to dedicate to student success and the mission of your institution. This training option is self-paced and accessible anytime so users can participate according to their individual needs and timelines. Many courses include an assessment of proficiency at the

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end.

- **Online Training** provides the conveniences of course access from the user's desktop with the advantages of instructor guidance and peer collaboration.
- **Classroom Training** provides hands- on education in an interactive classroom setting at a regional location or at your campus. Classroom training also is available in the form of pre-conferences to larger user group meetings along with special Ellucian education conferences

**Training Credits** are a purchasing option that enables you to budget a certain amount to use throughout the year for any combination of online or classroom training channels.

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## **Ellucian Management Consulting Services**

Ellucian Management Consulting provides your institution with structured, comprehensive access to our resources and expertise on the best practices in higher education. We offer dedicated onsite leadership, flexible remote services and access to specialists with expertise in higher education who are ready to serve as your trusted advisors to help you solve your strategic problems. Ellucian Management Consultants can help you to:

- Solve strategic problems via technology
- Improve solution adoption and consumption
- Optimise business processes
- Evolve people, process, policies and programmes to meet strategic needs
- Improve information for decision-making
- Provide guidance and advice on best practices for higher education, e.g., change management, communication strategy, IT organisation assessment.

Ellucian Management Consulting employs the general framework of Planning (initial assessment), Transforming (determining the desired future state) and Performing (measuring impact of suggested changes) to support our delivery of services.

### **Planning**

Our consultants work with our partner institutions to plan out the various aspects of our services to insure that the technology infrastructure and services align with institutional strategic goals. Based on initial discovery sessions with key stakeholders, we establish clear expectations with project participants. By employing change management principles we gain buy-in for the transformation and facilitate attainment of the institution's goals.

### **Transforming**

We work to ensure that our partner institutions achieve the operational efficiencies that can transform how they do business, assuring that their investments provide their promised value. The transformation to the desired future state is supported by institutional specific findings and recommendations and accompanied by a roadmap to guide institutional investment and deployment of resources.

Ellucian also offers extensive advisory services to help manage every aspect of your technology investment, providing needed breadth and depth of skill and giving your institution a chance to fully leverage our experience with customers and institutions from across higher education.

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## **Performing**

In support of ongoing success we provide services that cross the enterprise: business analytics, data governance, change management, etc. These services can assist the institution with, the capture and reporting of performance metrics, the development of improvement plans and escalation processes, all with a goal of ensuring consistent and predictable performance.