Agenda

8:30 am Welcome & Opening Remarks - Prof. Christopher P. Manfredi
    Provost and Vice-Principal (Academic)

8:40 am Managing Staff Performance (Administrative) -
    Mme. Lynne B. Gervais Associate Vice-Principal (Human Resources)

9:40 am Overview of R2R Project - Mme. Lynne B. Gervais Associate Vice-Principal (Human Resources)

9:55 am Q&A Session

9:59 am Conclusion and Wrap-up - Prof. Ghyslaine McClure, Associate Provost (Budget and Resources)
"You participate with enthusiasm during staff meetings and never hesitate to offer a creative suggestion or opinion. That has to stop."
Managing People & Performance: A MUST
Top Engagement Driver @ McGill

• One of THE most important drivers that were identified in an Employee Engagement Survey of over 1000 employees at McGill in 2012 is MANAGING PERFORMANCE

• Engagement is about:
  – What employees SAY about working at McGill (Reputation)
  – Whether employees intend to STAY (Retention)
  – The degree to which employees STRIVE to go beyond the call of duty (Productivity, Effectiveness, Student & Client Satisfaction)
3 Key Interconnected Components

Performance Management

Training

Recognition

Talent Management & Engagement
Performance Management: 3 Main Components

- Objectives (WHAT)
- Competencies (HOW)
- Development (Faculty & Employee)
What has changed?

Modification to Performance Dialogue Forms:

- **Plan and Appraisal now ONE** – *efficient and integrated*
- **Behavioural Competency levels now linked to job families** – *more concrete expectations of employees and language for recognizing and developing talent*
Reasons NOT TO Manage Performance

- No Time
- A Bureaucratic Exercise
- Too complicated
- Won’t make a difference anyway
- Could get us in to trouble (problems may escalate, if unionized – off limits completely)
- Not my strong suit
Reasons to Manage Performance

- Retain strong performers
- Ensure all employees make meaningful contributions
- Maintain engagement and morale
- Maximize collaboration and productivity
- Eliminate or reduce dysfunctional “work arounds” that affect students, you, and important others
- Adapt better to change as a Faculty or unit
What about unionized employees?

• They also need to know where they fit in, what is expected, how they are doing
• They may need to expand their skills at critical junctures
• They may have knowledge about challenges facing them, as frontline service providers, that is important to you
• Challenge emerges when the above is NOT addressed, and suddenly “performance management” becomes critical for one case
Why are Behavioural Competencies so important lately?

• We hire based on technical know how and lose people, most often, based on:
  – A “bad fit”
  – Attitudinal and behavioral factors

• Behavioural Competencies are all about HOW we move, adapt, initiate, influence, lead, manage ourselves and others, advance projects, etc.

• In times of change and contraction, behavioural competencies ARE MORE IMPORTANT THAN EVER.
McGill’s Behavioural Competencies

1. Change Agility
2. Resourcefulness
3. Teaming
4. Managerial Courage
5. Self-Awareness and Management
6. Client Service Orientation
7. Performance Orientation
## McGill’s Behavioural Competencies

### Change Agility—Embraces change and improvement to move the University ahead

<table>
<thead>
<tr>
<th>Proficiency Level A—Accepts change</th>
<th>Proficiency Level B—Actively deals with change and ambiguity</th>
<th>Proficiency Level C—Facilitates change and improvement</th>
<th>Proficiency Level D—Leads change and improvement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adjusts priorities to meet changing needs/situations</td>
<td>Can decide and act without having the total picture</td>
<td>Uses political savvy to enable progress</td>
<td>Is good at turning the creative ideas of others into actions, practices, or services</td>
</tr>
<tr>
<td>Maintains composure when things are up in the air</td>
<td>Responds appropriately to risk and uncertainty</td>
<td>Facilitates effective brainstorming or solution identification</td>
<td>Paints a credible picture of what the future requires and how to get there</td>
</tr>
<tr>
<td>Keeps an even keel when dealing with the unexpected</td>
<td>Learns quickly when facing new problems</td>
<td>Demonstrates good judgment about which creative ideas and suggestions will work</td>
<td></td>
</tr>
<tr>
<td>Doesn’t judge prematurely</td>
<td></td>
<td>Implements change in a manner that is sensitive to the culture</td>
<td></td>
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### Reactive

### Active

### Proactive

### Strategic
How to use the NEW Behavioural Competency

• As a supervisor, you can acknowledge competencies that the employee demonstrates well by providing specific examples;

• Employees and supervisors agree on 1-2 behavioural competencies on which to focus in order to enhance performance and job satisfaction, and to pursue career aspirations;

• Create a common understanding and clear expectations around desired behaviors, based on the proficiency grid and examples.
Existing training

- LEAN
- Coaching Ourselves
  - Attestations
  - LDP
- Organizational Effectiveness
- Workshops
- Interventions

Change Agility Resourcefulness

Teaming
Managerial Courage
Self-Awareness
Client Service Orientation
Performance Orientation
Recognition

Roy Saunderson (President and Founder of the Recognition Management Institute) defines:

Recognition as:

An intangible expression of acknowledgement of an individual/team for their positive behaviours, their personal effort or contributions they have made.

Rewards as:

A tangible, monetary or experiential item given to a person/team in return for reaching pre-set goals, a significant achievement or service performed.
Recognition

SMART also applies to Recognition:

- Specific
- Measurable
- Authentic
- Regular
- Timely
You *can* make a difference!

- Performance Management
- Training
- Recognition

Talent Management & Engagement
Organizational Development and Talent Management: WORKSHOPS & COACHING
HR Advisors
Johanne Houle (ext. 1558)
Angela Morse (ext. 3239)
Recruitment to Retirement
R2R Program

Academic Leadership Forum Presentation

24 November 2015
Today’s Agenda

- R2R Program History and Scope Overview
- Guiding Principles
- Program Timeline
- Business Requirements Validation – Participation
  - Who is contributing to the Business Requirements
- Benchmarking with other Academic Institutions
- Program Sponsorship and Team
- What’s next
Rationale for R2R – Current Situation

In 2012 an independent commissioned assessment performed by KPMG concluded:

- The university is unable to comply with certain regulatory requirements.
- The existing HR system is inadequate for McGill’s needs and distributed HR functions (e.g., unable to capture qualitative data to manage and develop talent or perform higher level workforce planning)
- Academic Personnel data is not part of any institutional data warehouse

- Banner HR
  - No future upgrades planned by the Vendor
  - Heavily customized due to limited Banner functionality e.g. (Minerva)
  - POPS has inadequate approval workflows; termination process is manual and incurs risks (Internal Audit)
  - Key processes are manual and information is maintained in multiple databases (i.e. leave management, hiring, tenure track, performance management)
  - Duplication of data entry is significant
Banner Person to Employee

- Faculty, Staff, Students, Applicants, etc.

- Banner Person
  - (effective dated)

- Banner Employee
  - (not effective dated; no future dating)

- Position
  - (effective dated)

- Benefits
  - (effective dated)

- Deductions
  - (effective dated)

- Job(s)
  - (effective dated)

- Source of Funds
  - (effective dated)

- Budget
  - (FIS module; not used at McGill)

- Drives
  - Employee status
  - Termination
  - Leaves – McGill built; can manage future dated events
Program Scope

- Select and implement a new HR Management System (Software as a service) cloud solution.
- Initial implementation will include a solution to support the processes that are currently operational across the University:
  - Core HR (supervisory organization, compensation, benefits administration)
  - Faculty management (tenure track, leaves, multiple appointments)
  - Payroll
  - Talent Management (talent acquisition, performance management)
  - Time and attendance (time tracking, vacation/leave)

This program will impact all of the University’s faculties, departments and administrative units, and will require various degrees of involvement from selected representatives from these organizational units.
Guiding Principles

Simplify

Automate

Accessible

Standardize
Rationale for R2R - Benefits

- Main tangible benefits R2R aims to achieve:
  - Processes will be streamlined, automated, and provide greater visibility in academic and administrative life cycles (e.g. immigration status)
  - Reduced duplication of data entry – Forms will pre-populate with identity information and allow for tracking/recording of decisions throughout a process
  - Access to data will be based on Department Unit and Faculty needs
  - System will facilitate reporting and analytics at the Department/Unit and Faculty levels with data collected at source
  - Facilitate compliance with policies and regulations
  - Contribute to talent management (career progression) and workforce planning through easily accessible data and reporting
  - Employee self-service with instinctive guidance on processes and next steps
# Program Timeline

<table>
<thead>
<tr>
<th>ID</th>
<th>Task Name</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
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<tr>
<td></td>
<td></td>
<td>Q2</td>
<td>Q3</td>
<td>Q4</td>
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<tr>
<td>1</td>
<td>Program Initiation</td>
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<td>2</td>
<td><strong>Solution Selection / Call For Tender</strong></td>
<td>Q1</td>
<td>Q2</td>
<td>Q3</td>
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<td>3</td>
<td>Technical Readiness</td>
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<td>4</td>
<td>HRMS Implementation</td>
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<tr>
<td>5</td>
<td>Organizational and Change Management</td>
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</table>
Participation Coverage (as of Nov 1)

A number of business requirements workshops and R2R awareness sessions have taken place with a large number of participants from both Administrative Units and Faculties.

<table>
<thead>
<tr>
<th>Unit</th>
<th>Coverage</th>
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<tbody>
<tr>
<td>Academic Personnel Office</td>
<td>12</td>
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<tr>
<td>School of Continuing Studies</td>
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<td>Enrolment Services</td>
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<td>Environmental Health &amp; Safety</td>
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<tr>
<td>Faculty of Agricultural &amp; Environmental Sciences</td>
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<td>Faculty of Arts</td>
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<td>Faculty of Dentistry</td>
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<tr>
<td>Faculty of Law</td>
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<tr>
<td>Desautels Faculty of Management</td>
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<td>Faculty of Medicine</td>
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<td>Faculty of Music</td>
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<td>Graduate &amp; Postdoctoral Studies</td>
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<td>McGill Queens University Press</td>
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<td>Planning &amp; Institutional Analysis</td>
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<td>University Secretariat</td>
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</tr>
<tr>
<td>University Services</td>
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</tbody>
</table>
Benchmarking with other Academic Institutions

- Benchmarking will target higher educational institutions with:
  - A single HRMS that serves both academic and administrative staff
  - Research intensive, publicly funded
  - Quebec/Canada/US
  - Medical Faculty
  - Hospital Affiliations
  - Banner conversion

- Focus of the benchmarking best practices:
  - Lessons learned
  - Length of the implementation vs. planned
  - Cost containment
  - Support delivered by the vendor – did they deliver what they said they would?
  - Overall satisfaction with chosen system

- To date we have spoken with:
  - Georgetown
  - Cornell
Program Sponsorship

- **Executive Sponsors**
  - Michael Di Grappa, Vice-Principal, Administration and Finance
  - Christopher Manfredi, Provost and Vice-Principal Academic

- **Steering Committee**
  - Lynne B. Gervais, Associate Vice-Principal Human Resources
  - Ghyslaine McClure, Associate Provost, Budget and Resources
  - Ghilaine Roquet, Chief Information Officer
# Program Team

<table>
<thead>
<tr>
<th>Role</th>
<th>Name</th>
</tr>
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<tbody>
<tr>
<td>R2R Program Manager</td>
<td>Sylvain Légaré</td>
</tr>
<tr>
<td>Lead Business Solution Manager</td>
<td>Sharon Barqueiro (Academic Personnel Office)</td>
</tr>
<tr>
<td>Lead Business Solution Manager</td>
<td>Diana Dutton (Human Resources)</td>
</tr>
<tr>
<td>Business Solution Manager</td>
<td>Anne-Marie Bruneau (Human Resources)</td>
</tr>
<tr>
<td>Solution Selection Project Manager</td>
<td>Sylvie Bermingham</td>
</tr>
<tr>
<td>Implementation Project Manager</td>
<td>Laurence Chapard</td>
</tr>
<tr>
<td>Change Management Manager</td>
<td>Elaine Drury</td>
</tr>
<tr>
<td>Legacy Development Project Manager</td>
<td>Angie Psarakos</td>
</tr>
<tr>
<td>Data Project Manager</td>
<td>Alison Verkade</td>
</tr>
<tr>
<td>Solution Architect</td>
<td>Glenn Hilditch</td>
</tr>
<tr>
<td>Business Analyst</td>
<td>Maria Jimenez Fernandez</td>
</tr>
</tbody>
</table>
What’s next....

Completion of the CFT business requirements and publish

Vendor solution and Integrator selection

Preparing for the CHANGE
  ➢ Continue to build R2R awareness across the university

Progress updates will be provided in Q1 2016

Thank You
Next ALF is December 16

Graduate Student
Supervision