

# Business Process Review

## Communications Strategy – Summer Session

### May 2007

#### 1. Objectives of the Project

A very short summary of the committee's work. You do not need to restate the full objectives of the committee itself. It is important to remember that we are already aware of these. This should be the publicity 'pitch' for the committee's work – concise, clear, engaging and user friendly.

The Summer Session Implementation team objectives

- Reduce the number of payrolls processed during the summer months on all four campuses from 24 to 12
- Pay summer session faculty and graduate teachers on a single payroll
- Extract summer session teaching payroll data
- Hold the data until the Fiscal Year End
- Insert the data back into Banner following Fiscal Year End
- Develop reports so HR and Finance can monitor the summer session process

#### 2. Communication Objectives

A clear detailed statement of the objectives in communicating, the principles underpinning this strategy and your key messages. These should be aligned with the objectives of the program/center

The primary objectives of this strategy are to:

- seek input from the key constituents of the summer session process on the University campuses (Finance, Controller's Office),
- keep these constituent groups informed of the summer session progress,
- seek input from constituent groups on implementation activities, outcomes, timeframes, and resolving implementation issues.

Key messages are:

- What is the new Summer Session Process?
  - *The summer session process takes place outside of banner and consists of four parts following the close of payroll.*
    - *An extract process to pull summer session data from NHRFINC.*
    - *Two holding tables*
      - *One history table to hold a copy of the untouched payroll data prior to being separated by the extract.*
      - *One temporary table to hold the extracted data until it is inserted back into banner.*
    - *A calculation process that recalculates the regular net earnings and the summer session net earnings for each employee.*
    - *An insert function that inserts the summer session data back into NHRFINC and NHRDIST after fiscal year end.*
- How does this affect me?
  - *Because the new summer session process no longer requires a separate summer session payroll faculty and graduate teachers will receive both their regular and teaching earnings on a single paycheck.*
- How does it affect my department?
  - *The 4 campus payroll departments will have to change the pay ids of previous summer session employees from their summer session pay id back to the regular pay id in order for this process to work.*
  - *The 4 campus payroll departments will no longer have to process double payrolls*

- *resulting from the two pay ids over the summer; saving valuable time.*
  - *The Controller's office should not experience a noticeable difference in the way they handle the summer session payrolls because they will still need to complete journal entries for all summer session earnings.*
  - *Campus academic departments will not notice any change in procedures*
- **How can I help?**
  - *The four campuses payroll and finance departments will be integral testing partners and advisors, processing test payrolls in payroll that are then analyzed by finance users to help determine the success or failure of the test.*

#### Major Concerns

- **Insert and calculation functions work properly**
  - *This process extracts summer session data, holds it, recalculates it, and re-inserts it at a future date.*
- **Finance Balances**
  - *Because this process separates and inserts data into banner once payroll has been processed it is very important to ensure that finance balances. Further, the insert does not happen until after the fiscal year closes which means that it is imperative to ferret out problems through testing.*
- **Future pay numbers will not be affected by the insert function**
  - *As part of the insert process, the pay number is changed to 8 on the monthly campuses (16 bi-weekly) and the sequence number will be changed to 99. There has been some concern that this may affect the actual August payroll and subsequent adjustment checks, particularly on the BZ campus so this must be tested. Testing which occurred in late April verified that future pay numbers will not be affected by the insert process changing pay number to 8 and sequence number to 99.*
- **Tax buckets will be adjusted properly**
  - *Benefits and deductions such as FICA and medicare are paid in the current FY but come out of the future FY. Campuses must know they will still have to do journal entries to reverse these.*

### 3. Key Audiences

Who are you communicating with – a detailed description of your key audience and user groups. What are your priorities? Include what they already may know about you – people, research, subject What do you think they should know? And do break down the users into sub categories and add contacts already made.

### **Advisory Group**

This group consists of individuals from the Banner/Finance, Banner/HR, and Controller's. They are contacted regularly to discuss the technical portion of the summer session process and brainstorm possible areas of concern. The buy-in from this group is critical to the direction and success of this process because the results will directly affect Banner/Finance. This advisory groups consists of the following members; Kevin Ward, Dawn Watkins, Ed Binkley, Jeana Henley, Leann Anderson, Terri Elletson, Kathy Haggart, Kelly Leeds, and Paul Lambeth.

### **Oversight Committee**

The oversight committee will need to have periodic progress reports in order to keep up to date on process developments such as success or failure of testing, implementation and performance metrics.

### **Project Director (Jo Oudshoorn)**

Jo provides an important source of direction to the project. Weekly project updates and informal, unscheduled meetings provide a means to maintain testing and implementation deadlines, and to convey status updates to the Oversight Committee. Jo is also an important source of suggestions in the way of communication techniques and coordinating testing processes.

### **HR Directors**

Periodic status updates to the HR Directors are important to keep them up do date on how the summer session process works and what it will do for their departments.

### **HR Team**

This group is a principle hub of information dissemination because the HR Team consists of both functional and technical users of the Banner/HR module. They are programmers involved in creating the new summer session process, report writers needed to create reports to pull data to monitor the process, functional users integral to the data entry component of the implementation, and testers. Additionally this group has the ability to take information and spread it to other campus contacts such as their HR Directors.

### **Payroll Managers and Technicians**

Critical to the implementation of this project. Payroll managers and technicians must have a detailed understanding of the data entry component of the process so that the summer session earnings will be pulled correctly.

#### 4. Specific Marketing Opportunities

We have several people from other areas of the University who are enthusiastic about the implementation of the various IT enhancements. We need to use these people as advocates for BPR implementation.

We need to hold advisory/focus group meetings with the specific objective of positively marketing the benefits of the enhancements to the other employees. Options that are available to us:

Advisory group/focus group meetings not only to gather input but also to demonstrate the benefits

Engender enthusiasm through a multi layered communication channel. This is a similar principle to pyramid marketing structure.

5. Target audience ranked by importance	Preferred/appropriate channel of communication
How are you going to communicate, what is the most appropriate channel – a newsletter, a large conference, networking lunch, workshop, an evening reception, email alerts, press release, website, promotional literature, regional seminars?	
You will probably have several channels that are appropriate	
HR Team	Regular Meetings Emails Website Written training materials Testing and evaluation
Advisory Group	Meetings Email
Payroll Managers/Technicians	Meetings Written training materials
Project Director	Weekly progress reports, emails
Oversight Committee	Meeting presentations
HR Directors	Meeting presentations
Campus Community (Academic administrative staff, faculty and graduate students)	Formal correspondence

#### 6. Communication Timeframes

Key Audience	Regular Communication	Responsibility
HR Team	BZN: 1 weekly	Eric Wold/Max Thompson/Tom Hoffman
Advisory Group	Meetings and emails as needed	Eric Wold
Payroll Managers/Technicians	Meetings and Training as needed	Eric Wold/Max Thompson
Project Director	Weekly Implementation Team Meeting	Eric Wold
Oversight Committee	Meetings	Jo Oudshoorn/Eric Wold
HR Directors	Meetings and email updates	Eric Wold/Campus HR Team members
Campus Community (Academic administrative staff, faculty, graduate students)	Formal correspondence as the process is rolled out.	Eric Wold

#### 7. Achieving Objectives

Full details of all the relevant communications activities developed into a working project plan with deadlines and responsibilities. Remember to include key milestones and review dates, think carefully about cost, include staff and consultants, also how will you evaluate success? Below are some suggested groupings, the table is led by activity but you may well want to have one for each year of activity.

Communications plans are living documents and will need regular reviewing and updating.

<b>Activity</b>	<b>Resources</b>	<b>Deadline, Timeframe</b>	<b>Success Criteria</b>
Internal Communication	Eric, Max, Tom	As required	
Website	Max, Eric, Tracy	As required	Issued & on the web
Regular Meetings	HR Team, Implementation Team Leads	Weekly	Update conducted
Meetings as Required	HR Team, Banner Finance, Controller's Office	As required	Conducted and all parties involved agree on course of action

### **8. Evaluating Success**

How will you know if you have succeeded and met your objectives? How are you going to evaluate your success, what performance indicators and evaluating measures will you use.

Provision of communications and updates as per schedule

Training Evaluations

Successful Payroll Post Implementation

Successful Fiscal Year End