Workday Governance Model
February 1, 2020

Since launch, the Workday Team and Governance teams have been evolving — learning from successes and challenges, adapting processes to meet the needs of the users and the agility of the Workday platform itself.

UPDATED REQUEST INTAKE PROCESS

Qualtrics Form

Beginning in early 2020, Workday change requests should be sent through the Workday Change Request Qualtrics form, located in Workday Central (coming soon). This form provides one clear location and method to request changes.

Additionally, adoption of this form helps to provide the Workday Team with critical information regarding the change request from the beginning, resulting in more accurate and faster resolution of request items.

All users can submit a change request form, including any of these parties:
- All UVA Workday users
- UVA HR Benefits / Compensation teams
- UVA HR Talent Support / Solution Center
- UVA HR Senior Directors of Service
- Training Team
- UVA HR Recruiting
- UVA Payroll

Workday Request Process

After submitting a change request through the Workday Request Qualtrics form, a change control case is created. The Workday team gathers more information and creates an Adoption item in Workday to allow for prioritization.

The Workday team will meet with governance teams to prioritize Adoption items and backlog items.

In 2019, the Workday team implemented 211 change control items in production, broken down amongst four releases:

<table>
<thead>
<tr>
<th>2019 Release</th>
<th>Adoption Items Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td>UVA Release 1</td>
<td>35</td>
</tr>
<tr>
<td>UVA Release 2</td>
<td>64</td>
</tr>
<tr>
<td>UVA Release 3</td>
<td>47</td>
</tr>
<tr>
<td>UVA Release 4</td>
<td>53</td>
</tr>
<tr>
<td>Off Release</td>
<td>12</td>
</tr>
</tbody>
</table>
Change Request Communications

When an item is prioritized for the current release, the Workday analyst will notify the change requestor of such. The Workday team will then proceed to work on the changes and test solutions, staying in contact with the change requestor for questions and testing.

Communications and training are considered for each change item prior to implementing the change in production.

Upon implementation and typically in alignment with Release dates, formal communications are sent to the requestor. Notification of release conclusion is also sent to the UVA community broadly through newsletter announcements and posting release notes in Workday Central.
The graphic below depicts the overall Workday business request process.

**PROCESS PRINCIPLES**

1. Adding Value
2. Agility
3. Transparency

**REQUEST PRIORITIZATION**

- Program or policy change, HR Operational Calendar, Legal/Regulatory/Security, Data quality fixed: DO NOW
- Addresses a capability gap, New data exchange, Process Improvements, New service offering: DO NEXT
- Small process efficiency gain, Nice to have features, Idea needing to be addressed: DO LATER
- No longer a need, Not possible, Better solution possible: DO NEVER

**WORKDAY BUSINESS REQUEST PROCESS**

1. **Customer Requests**
   - Understanding, scoping, and scaling of customers' requests from phone calls, chats and emails

2. **Salesforce**
   - Records and intakes customer requests
   - Identifies bug issues/operations or change control item

3. **Workday Adoption Planning**
   - Visibility into what we are working on
   - Shows Roadmap & upcoming items
   - Shows backlog of items in Change Control
   - Approved items for configuration

4. **Jira**
   - Tracks approved Change Control items from the WD Adoption Planning
   - Tracks current release items and work
   - Tracks progress of:
     - Testing, bugs fixes, and new integrations
     - Operational items needing configuration changes

5. **Training**
   - Educate users on any changes

6. **Communications**
   - Message new functionality to impacted users
TYPES OF REQUESTS

Operational Support:
This type of support includes two categories:
1. Day-to-day break-fixes when someone is stuck and cannot complete their work or needs an immediate resolution. These issues should be directed to the UVA HR Solution Center (AskHR@Virginia.edu) rather than to the Workday team’s change request form.
2. Production support issues including:
   • Pay-impacting issues
   • Critical integrations (vendors, systems)
Production support issues that are not immediately critical, can be vetted and prioritized, should be directed to the Workday team through the change request form. If a system change is required, these requests feed into Jira, our official source of IT audit.

Change Requests:
Requests to optimize Workday and to eliminate work-arounds. These are prioritized in Workday Governance meetings and are delivered during Releases.
   • Eliminating workarounds
   • Optimizing and enhancing Workday
Change requests feed into our Workday adoption planning for evaluation.

Projects:
Work that builds new functionality and capability within UVA HR.

UVA RELEASE EVALUATION PROCESS

The below methodology guides determining which requests will be developed as solutions in a UVA Release:
1. Items are initially sourced from the Change Request Log.
2. Items are stored in Workday Adoption Planning, categorized by functional areas.
3. The Workday Team meets monthly with Governance teams (by functional areas) for their input on change request prioritization. Teams follow the Request Prioritization Model as a guide for evaluating what requests should be prioritized. (See image below.)
4. The Workday Team works on resulting list of prioritized items during each release.
REQUEST PRIORITIZATION MODEL

Requests are prioritized by the Workday Team and the Governance teams using the following model. This model allows us to ensure that issues of the highest urgency and highest value are tackled first.

**DO NOW**
- Creates efficiency, eliminates complexity
- Program or policy change
- HR Operational Calendar item
- Legal/Regulatory/Security - data protection risks
- Data quality fixes for a large population

Highest urgency, highest value

**DO NEXT**
- Addresses a capability gap
- New Data Exchange need (integrations)
- Process improvements
- New service offering

Moderate urgency, moderate value

**DO LATER**
- Small process efficiency gain
- "Nice to have" features
- Idea submitted that needs to be addressed

Lower urgency, lower value

**DO NEVER**
- No longer a need
- Not possible
- Other better solution in place to address issue

Lowest urgency, lowest value
WORKDAY GOVERNANCE MODEL

The Workday Team will meet with individual functional teams according to the below cadence. This new structure ensures more effective Workday Governance, promotes clarity of roles and more meaningful participation, and enables impacted teams to have a significant voice in prioritizing requests and changes.

<table>
<thead>
<tr>
<th>Group</th>
<th>Attendees</th>
<th>Meeting</th>
<th>Cadence</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benefits</td>
<td>Scott Seal, Rebecca Gristina, Debbie Glass, Bill Birchler, Joanne Hoagland</td>
<td>1) Discovery 2) Prioritization</td>
<td>Monthly</td>
<td><strong>Discovery:</strong> Meet to identify new change control items</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td><strong>Prioritization:</strong> Meet to prioritize items for upcoming release</td>
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<td>Compensation</td>
<td>Scott Seal, Terri Stevens, McLean Schoonover, Debbie Glass, Chris Smarte</td>
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<tr>
<td>Core HCM</td>
<td>Josh Christian, Melissa Frederick, Gabriela Garcia-Largen, Jenn Oliver, Jennifer Weaver, Amanda Easton</td>
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<tr>
<td>Payroll / Time Tracking</td>
<td>Paul Grisdale, Jill Cline, Augie Maurelli, Debbie Glass, Marcia Frampton, Rebecca Gristina, Terri Stevens, Gabriela Garcia-Largen, Teresa Wimmer, Lorie Powell</td>
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<td>Recruiting</td>
<td>Jennifer Garrett, Chris Cunningham, Laura Amdusky, Jody Goellner, Janet Turner-Giles, Kara Comer, Bob Romanko, Amanda Easton</td>
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<tr>
<td>Talent Development &amp; Learning</td>
<td>Carolyn Cullen, Will Davis, Jacob Henderson, Cynthia Young, Jody Knowles, Amanda Easton, Diane Lahue</td>
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<tr>
<td>UPG</td>
<td>Syed Mahmood, Kara Comer, Christine Rudge, Lory Raines</td>
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<td>UVA Health / Nursing</td>
<td>JT Hall, Josh Christian</td>
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<td>As needed</td>
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<tr>
<td>Provost / Academic</td>
<td>Maggie Harden, Jenn Oliver</td>
<td></td>
<td>As needed</td>
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</tbody>
</table>
**RELEASE ITEMS AND BACKLOG ITEMS**

**Release Items:**
Items prioritized in the governance meetings slated for current release. This list is posted in Workday Central.

**Backlog Items:**
Requests not yet prioritized for a release. Items on this list may be worked on at a later date. This list is also posted in Workday Central.

**Key Operational Activities:**
HR operational activities that occur each year. These may require configuration changes and testing. Example include Open Enrollment, Merit, Performance Review, etc.

**Projects:** An effort with a fixed duration to introduce new capabilities. These typically take place outside of the release cycle.

**2020 RELEASE TIMELINE AND ROADMAP**
View a list of our 2020 Roadmap items on Workday Central, filterable by category, starting month, and ending month.

**RELEASE COMMUNICATIONS**

To ensure individuals requestors and the broader UVA community have access to Workday release information, the list of items prioritized for each release is published in advance of the release on Workday Central. At the conclusion of each release, the “release notes” are published on Workday Central, detailing which of these items were completed. Release notes are filterable by Functional Area, Division (Academic, Medical Center, etc.), and Status (complete or in progress) so that users can easily find the information they’re looking for.

Historical release notes and backlog items are maintained on Workday Central, both also offer filtering functionality.

Release information is communicated at the conclusion of each release broadly in Workday and in newsletters across the University and UVA Health. As needed, individual teams and departments are informed in person or via email that their requests have been completed and are provided technical information pertaining to the change.