



# Scenario Based Workforce Planning

**THOUGHTFUL STRATEGIES FOR LEADING YOUR WORKFORCE IN THE COVID-19 ERA**

May 5, 2020



Before We Get Started



# A Special *Shout-Out* to HR Professionals

- You are higher education's front-line workers
- Navigating uncharted waters
- Being asked to provide best practices, when none exist
- Adapting to changing conditions, trends, and demands each day
- Providing a voice of reason and organizational calm
- You have risen to the occasion and are guiding your organizations through these uncertain times

***THANK YOU!***

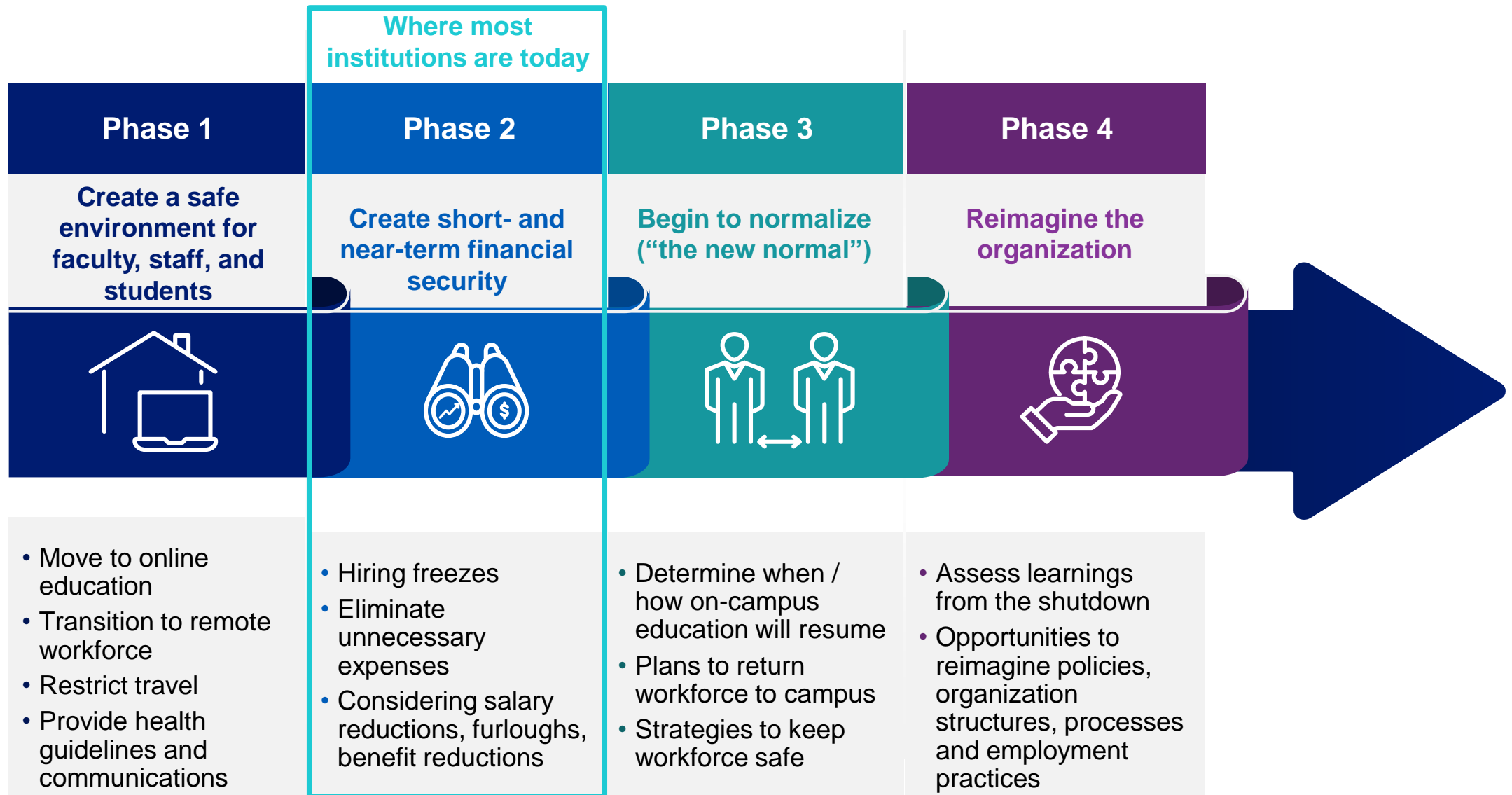
# Today's Agenda

- **Background and Context**
- **Balancing Financial and Cultural Health**
- **Planning to Return the Workforce to Campus**
- **Recommendations and Next Steps**



# Background and Context

# Evolution of the Crisis



# Integrated Approach?

## Importance of Gaining Insights From Multiple Perspectives



Scenarios being created to determine when and how to bring students back campus safely

In some cases, strategies are not being developed in an holistic or integrated manner (multiple working groups or just a few institutional leaders)

The best plans are those that are broadly developed and vetted across multiple constituents

### Successful planning should include multiple perspectives to:

- ✓ Create a thorough understand of the impacts and implications to all stakeholder groups
- ✓ Reduce risk from having disconnected or inconsistent efforts
- ✓ Achieve a comprehensive and coordinated strategy

# Balancing Financial and Cultural Health



# Balancing Financial and Cultural Health

## Institutional Considerations

- In response to the current crisis, institutions are considering several cost-saving options:



### Furloughs

- Workers displaced due to ceased campus operations (dining, facilities, administrative support)
- Full and partial furlough scenarios
- Balancing short-term cost savings with longer term culture impacts



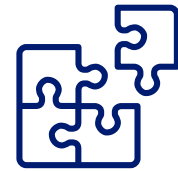
### Reductions in Pay

- Various scenarios emerging
  - Senior administrators
  - All staff
  - All staff and faculty
- Differing time lengths
  - 3, 6, 9, 12 month scenarios



### Retirement Contribution Reductions / Suspensions

- Short-term suspensions
- Longer term-reductions
- Careful coordination with plan administrators and providers



### Voluntary Separation Incentive Programs

- Financial incentives offered in exchange for voluntary separation
- Distinguished from early retirement programs
- Typically offered to faculty and staff with a combined age and service greater than 65 or 70

***Carefully consider local, state, and federal laws and regulations!***

# Balancing Financial and Cultural Health

## Additional Realignment Options

- In some cases more dramatic options are being explored:
  - Permanent Layoffs or other RIFs
  - Outsourcing
  - Service Level Reduction / Elimination
  - Role Consolidation
  - Benefit Reductions
  - Use of a Contingent Workforce
  - Consortiums with Other Partners



Consider using a “mission-based” approach for identifying positions to be reduced. Identify and evaluate the degree to which every position is mission critical.

# Balancing Financial and Cultural Health

## Impact Analysis

- Assess each scenario and its impact on the following:
  - Safety and security of your faculty, staff, and students
  - Core operations
  - Teaching and learning
  - Research
  - Student support
  - Organizational performance and productivity
  - Near-term and long-term cultural impact
  - Strategic plans and priorities
  - Financial health

# Balancing Financial and Cultural Health

## Impact Analysis Example

### Definitions - Degree of Impact

Level / Impact	Number of Employees Directly Impacted	Financial Savings	Enrollment Impact	Student Experience Impact	Operational Impact	Cultural Impact	Brand / Reputation Impact	Donor Relations Impact	Difficulty of Recovery Impact	Duration of Impact
1	Less than 20	<\$250k	<5% reduction	None	None	None	None	None	None	< 1 year
2	20-30	\$250k-\$500k	5%-10% reduction	Limited	Limited	Limited	Limited	Limited	Limited	1 year
3	30-40	\$500k-\$750k	10%-15% reduction	Moderate	Moderate	Moderate	Moderate	Moderate	Moderate	1-3 years
4	40-50	\$750k-\$1MM	15%-20% reduction	Significant	Significant	Significant	Significant	Significant	Significant	3-5 years
5	> than 50	>\$1MM	>20% reduction	Devastating	Devastating	Devastating	Devastating	Devastating	Devastating	>5 years



# Balancing Financial and Cultural Health

## Reimagining Operations

- Take stock of what you've learned over the past two months to identify new ways of operating
  - Which functions / positions can continue to be remote?
  - How can technology be used to improve legacy processes?
  - What have you learned about new ways of connecting and communicating with each other?
  - Are there programs or initiatives that are producing low value and can be eliminated or refocused?
  - What policies need to be relaxed or changed, or are non-existent?
  - What have you learned about your own nimbleness and ability to change or adapt?
  - What skills or competencies have you noticed are in need of enhancement?
  - What implications are there for the way you evaluate and reward performance?



# Polling Question

**To what degree are you considering opportunities to redesign current organizations, processes, or policies?**

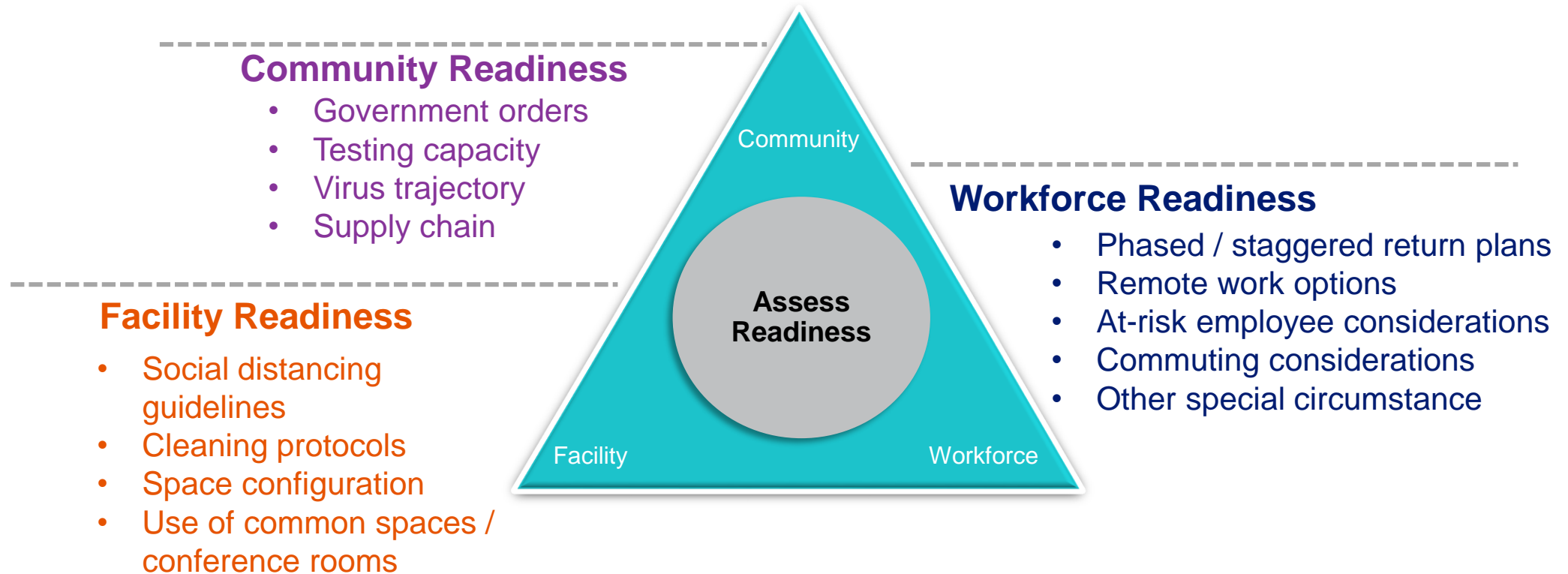
- Have not yet assessed opportunities
- Have had some conversations but have not identified opportunities in a formal manner
- Have identified a number of opportunities and are actively developing restructuring plans



# Planning to Return the Workforce to Campus

# Readiness to Return Workforce to Campus

- It is important to understand and assess “readiness”, across three dimensions, to return your workforce to campus





# Implications / Considerations for HR

In the days and weeks ahead you'll experience new and additional demands

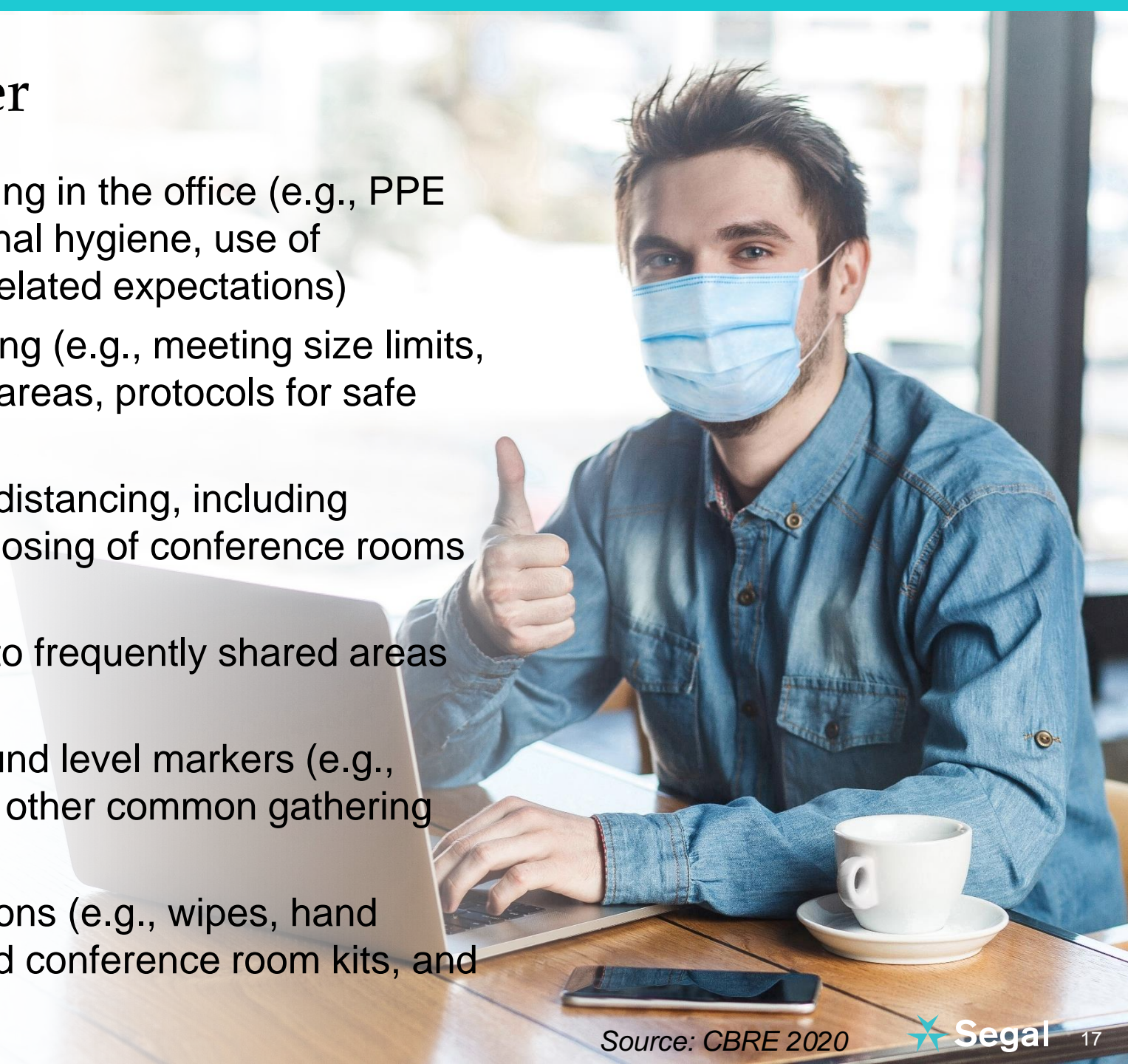
## **Priority 1 - Continue to protect the health and safety of your workforce**

- Develop strategies for how and when to bring your workforce to campus
  - Create criteria and process for prioritizing return to campus plans
    - Determine who needs to return to campus versus those that can continue to work remotely
    - Consider full or partial return to campus scenarios
    - Assess phased return strategies
  - Develop strategies and guidelines for adhering to social distancing and other public health guidelines
  - Create measures to accommodate immediate health needs (PPE, etc.)
  - Identify strategies for addressing high risk / vulnerable populations



# A Brief Checklist to Consider

- ❑ Develop practical guidelines for working in the office (e.g., PPE usage such as face coverings, personal hygiene, use of amenities and meeting spaces, and related expectations)
- ❑ Develop guidelines for social distancing (e.g., meeting size limits, identification of “no sitting/gathering” areas, protocols for safe entry/exit/circulation)
- ❑ Reconfigure space to achieve social distancing, including removal of seats and closure / repurposing of conference rooms and cafeterias
- ❑ Assess configuration of, and access to frequently shared areas (e.g., pantries) and amenities
- ❑ Establish safe distance zones or ground level markers (e.g., stickers) around reception desks and other common gathering points
- ❑ Increase availability of sanitation options (e.g., wipes, hand sanitizer), provide self-serve desk and conference room kits, and plan for safe disposal of PPE





# A Brief Checklist to Consider *continued...*

- ☐ Evaluate individual food and beverage options
- ☐ Assess the opportunity for touchless modifications or technology throughout the facility and parking areas
- ☐ Consider antimicrobial surface shields and self-cleaning adhesive surfaces on high touch surfaces
- ☐ Adapt booking procedures for meeting rooms and desks in shared environments for single use or fewer users; allow for re-cleaning per booking
- ☐ Determine how employees will access shared items (e.g., supplies, copiers)
- ☐ Consider expanding workday and work week routines to facilitate staggered and changing access



# Implications / Considerations for HR

## **Prepare for a new set of demands and issues**

- Public health officials are warning of significant impacts to mental and behavioral health
  - Develop strategies and approaches for enhancing existing services
  - Anticipate increased demand for EAP program
- Anticipate cultural issues and feelings of loss, particularly for those impacted by job restructuring
  - Prepare education programs and strategies to enlighten campus leaders on how to lead and manage in a new era
  - Consider developing new protocols for identifying at-risk individuals
  - Increase frequency of outreach and communication about available resources
- Anticipate increased demands for employee relations support



# Implications / Considerations for HR *continued...*

## **Additional Implications / Considerations for HR**

- Provide guidance to institutional leaders on managing in a more complex environment
  - Develop tools and materials
  - Create easily accessible just-in-time training and education
- Contingency plans should be developed in the event a COVID-19 peak returns
- Develop new policies and guidelines that help the workforce navigate social distancing and other new standards of engagement
- Review existing PTO, sick pay, and leave policies for applicability in a new era



# Implications / Considerations for HR *continued...*

## **Additional Implications / Considerations for HR**

- Evaluate how technology can be utilized to enhance communication and collaboration
  - Consider using artificial intelligence tools to enhance services and dissemination of critical information
- Develop plans and guidelines for the use of space and facilities
- Develop a comprehensive approach to managing change
  - Adopt a foundational change management planning framework
- Assess training needs and modify existing programs to address immediate needs and concerns



# Create and Deploy a Structured Approach



# Building An Integrated Team

- When planning to return the workforce to campus, keep one simple rule in mind: *everything is connected*
  - Create a planning effort the involves all critical stakeholders
- Now more than ever...HR needs to have a *Front Row Seat at the Table*
- Beyond HR, additional planning stakeholders may include:

- Academic Leadership
- Student Affairs
- Student Leadership
- Communications
- Environmental Health and Safety
- Diversity and Inclusion
- Campus Operations
- Finance
- Information Technology
- Legal Services and Compliance
- Police and Security
- Procurement
- Risk Management
- Government and Community Relations



# Polling Question

**To what degree has your campus created a structured and integrated approach for recovery and returning the workforce to campus?**

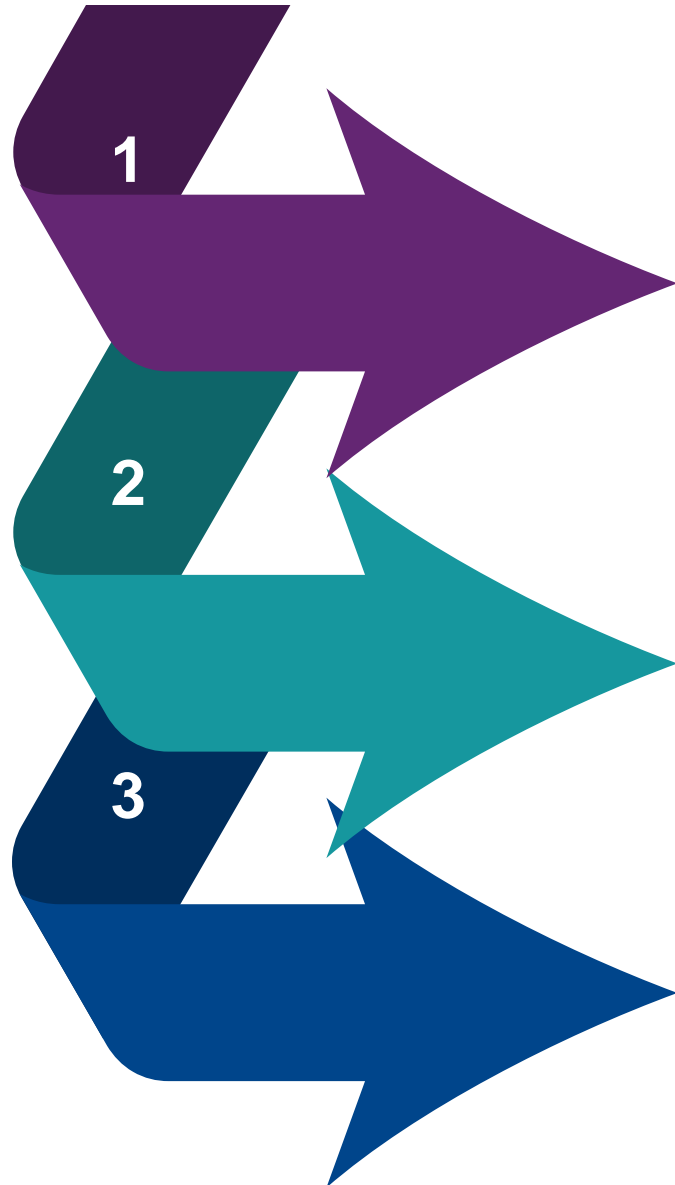
- No formalized or structured approach at the moment
- Some conversations are occurring but not inclusive of all critical stakeholders
- A fully integrated and structured approach is in place



# Recommendations & Next Steps



# Summary of Recommendations



## **Mobilize a cross-functional COVID-19 Response Team and set a regular meeting schedule**

- Monitor the evolving situation
- Assess Community, Facility, and Workforce Readiness to Return to Campus
- Monitor health and safety patterns, guidelines, policies, and regulations
- Carefully monitor changes in the policy and regulatory environment
- Create a plan for each part of your organization, and evaluate short- and long-term strategies
- Ensure efforts and strategies are integrated

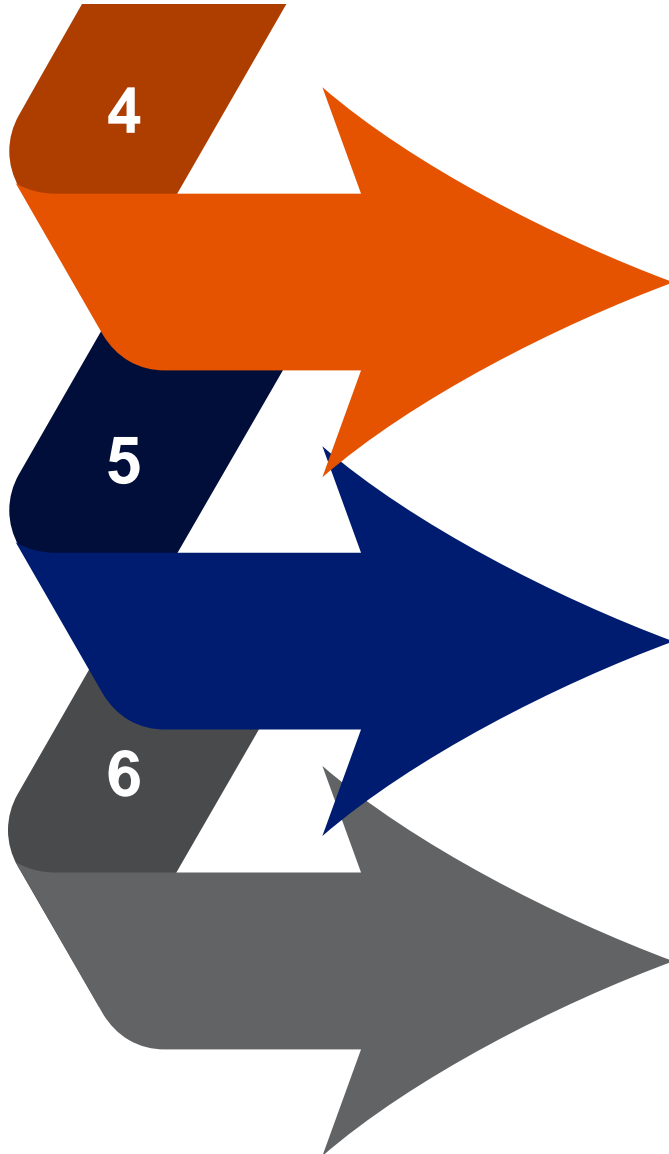
## **Conduct a comprehensive impact analysis for multiple scenarios**

- Safety and security of your faculty, staff, and students
- Core operations
- Teaching, learning, and research
- Student support
- Organizational performance and productivity
- Near-term and long-term cultural impact
- Strategic plans and priorities
- Financial health

## **Consider avenues for reimagining operations**

- Which functions / positions can continue to be remote?
- How can technology be used to improve legacy processes?
- What have you learned about new ways of connecting and communicating with each other?
- What policies need to be relaxed or changed, or are non-existent?
- What have you learned about your own nimbleness and ability to change or adapt?

# Summary of Recommendations *continued...*



## **Develop a communications approach and foster transparency**

- Provide a thoughtful approach to effectively and regularly communicate changes to impacted audiences across campus
- Consider how you will manage on-going communications for each phase of recovery

## **Prepare for what's next for HR**

- Significant impacts to mental and behavioral health
- Anticipate cultural issues and feelings of loss, particularly for those impacted by job restructuring
- Anticipate increased demands for employee relations support
- Provide guidance to institutional leaders on managing in a more complex environment
- Contingency plans should be developed in the event a COVID-19 peak returns
- Develop new policies and guidelines that help the workforce navigate social distancing and other new standards of engagement
- Review existing PTO, sick pay, and leave policies for applicability in a new era
- Evaluate how technology can be utilized to support a remote workforce / online learning

**Take care of yourself – your institution needs you**

# Questions





# Thank You and Stay Safe!



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