



HR Job Opportunities in Organization Effectiveness (OE)

Confidential – Deck contents not for further communication or distribution beyond HR at this time.

July 15, 2020

JULY 28, 2020 UPDATES

Refer to yellow shaded boxes and or “7/28/20 Update” references on Slides 35-46 for updates

Update Summary:

- Lead LMS Administrator job grade updated to Grade 14
- Organization Effectiveness Program Management Consultant title updated to “Organization Effectiveness Program Consultant”

HR Job Opportunities in Organization Effectiveness (OE)

Thank you for joining us today. We will begin momentarily.

All meeting invitees other than panelists will be on mute
to support meeting flow and minimize disruption given large audience size

Please still do not place us on hold and keep your phone on mute
so we will not hear your hold music, messages or background noise

Share your questions, comments and feedback via the chat feature
Which will be monitored throughout the meeting

This meeting will not be recorded

Reflection

kp Putnam
Director, Culture, Change & Engagement

Introductions



Victor Agruso

Interim Executive Leader of Organization Effectiveness
and Workforce Planning & HR Administration

OE Executive Sponsor and Meeting Host



Michelle Leedy

Director of Organization Design, Development &
Performance Management

Organization Design Leader and Co-Presenter

Purpose

- Review updated OE future state structure and job opportunities in relation to state of the business
- Outline next steps for deployment and staffing

FLOW

1. Opening Comments
 - Mission, Vision, Values, Strategy, Priorities
2. OE Future State Structure and Jobs
 - Direction and alignment with OneHR design and Trinity Health strategic priorities
 - Jobs / Job Descriptions and Organization Charts
3. Next Steps

Reminder

This meeting is for Active Colleagues only and should not be forwarded under any circumstances to colleagues on voluntary or involuntary Leave of Absence (LOA), or to personal email addresses.

Other communication is underway to appropriately engage colleagues on furlough or other LOA while maintaining compliance with LOA-related communication requirements.

Opening Comments

Mission, Vision, Values, Strategy, Priorities

Our Mission

We, Trinity Health, serve together in the spirit of the Gospel as a **compassionate and transforming healing presence** within our communities.

Our Core Values

Reverence

Justice

Commitment to Those
Who are Poor

Stewardship

Integrity

Safety

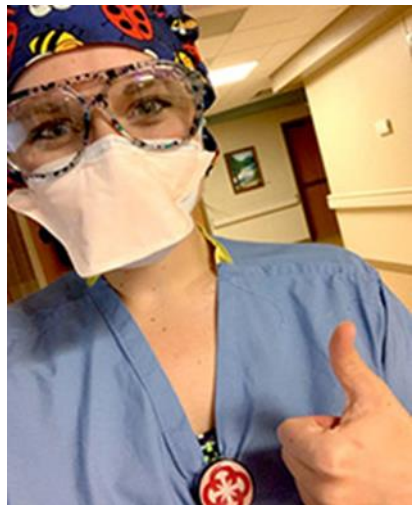
Our Vision

As a mission-driven innovative health organization, we will become **the national leader in improving the health of our communities and each person we serve.** We will be the **most trusted health partner for life.**

As a mission-driven health care organization, the service and dedication of our colleagues has been extraordinary in response to the COVID-19 crisis

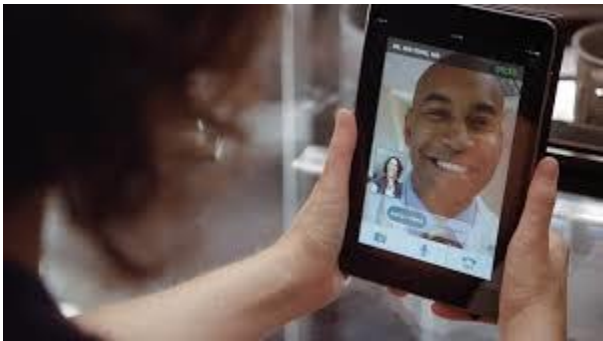
Rapid implementation of telehealth services. Over 130,000 telehealth visits per month!

Trinity Health's Nurses Leave Home to Serve Hardest-hit Areas of U.S.

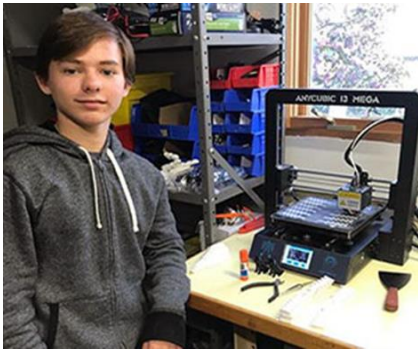


Amazing Grace Sung by Nurse from St. Mary Mercy Livonia

Holy Cross Hospital in Fort Lauderdale Receives Heartfelt, Anonymous "Thank You" Letter



Well-being Tools and Colleague Resiliency Resources are Here to Help



TIS Colleague's Son Uses Science Skills to Make PPE for Saint Joseph Mishawaka Medical Center

St. Peter's Health Partners Battling COVID-19 with Groundbreaking Therapies, Interdisciplinary Care

Hundreds of colleagues working around the clock as part of Incident Command Teams to create new guidance for processes, procedures and knowledge-sharing



Mercy Care Reinvents Approach to Serving Homeless Individuals for COVID-19



We took immediate steps to ensure stewardship and sustainability

- Supported our colleagues through investment in PPE, supplies and equipment for pandemic, staffing, etc.
- Secured additional funding for liquidity/cash needs
- Discretionary spending reductions
- Capital spending frozen except for crisis needs
- Delayed TogetherCare (Epic) Wave 2 rollout
- Sought and received discounts/concessions on vendor/supplier fees
- Reassigned/redeployed staff to different roles and needs
- Re-forecasted our financial performance
- Quarterly forecasts for first two quarters of FY21: July-September and October-December. Prepare budget for remaining 6 months of FY21



Short List of FY20/FY21 TogetherHealth Priorities

- **TogetherHealth Member (People We Serve, Colleague, Physician) focus**
 - Safety/Zero Harm
 - Enhance member relationships and reduce fear of contagion
 - Improve colleague engagement and demonstrate a culture of service
- **Common Platforms**
 - TogetherCare (Epic)
 - ERP (supply chain and finance)
 - FirstChoice
 - AvaSure Tele-Safety Attendant
 - Kronos
- **Portfolio Repositioning and Growth**
 - Challenged ministries
 - Priority new services, M&A
- **Sustainability (Mission, Strategic, Financial and Community/Population Health)**



Overarching Statement of Intent

- We will **restructure** to create a **NEW, sustainable** Trinity Health
- We will **right-size our cost structure** to an expected lower revenue size for the next year
- We will **increase the value** of our services
- We will **recover and grow our revenue** and **deliver sufficient income** to fulfill our mission
- We will rebuild while **leveraging and optimizing** our skill and scale, leadership, colleagues, culture, individual health ministry and collective system strength, and our faith-based ministry
- We will support our **colleagues, communities** and **the common good**

OE Priorities by *Most Aligned* NEW Mission Critical Priorities

OE Priorities	Safety	Care Delivery	Stewardship / Sustainability	Priority Aim Focus
1. COVID Leader & Organization Support - Safety & Sustainability	X		X	
2. TA Production & Contract Labor Spend Reduction		X	X	X
3. Nurse Retention	X	X	X	X
4. Regulatory, Safety, Risk Management Training & Administration	X	X		
5. Priority Customer/Initiative Training & Administration	X	X	X	
6. OneHR – Stewardship & Sustainability			X	
7. Onboarding & Orientation (within service scope)			X	
8. Performance Management	X	X	X	
9. Colleague Engagement	X	X	X	
10. Talent Management / Succession Planning			X	
11. Virtual & Other Leadership Development			X	
12. Systems Maintenance & Training			X	

You are appreciated for all you continue to do and the sacrifices you continue to make to serve together in the spirit of the Gospel as a **compassionate and transforming healing presence** within our communities.



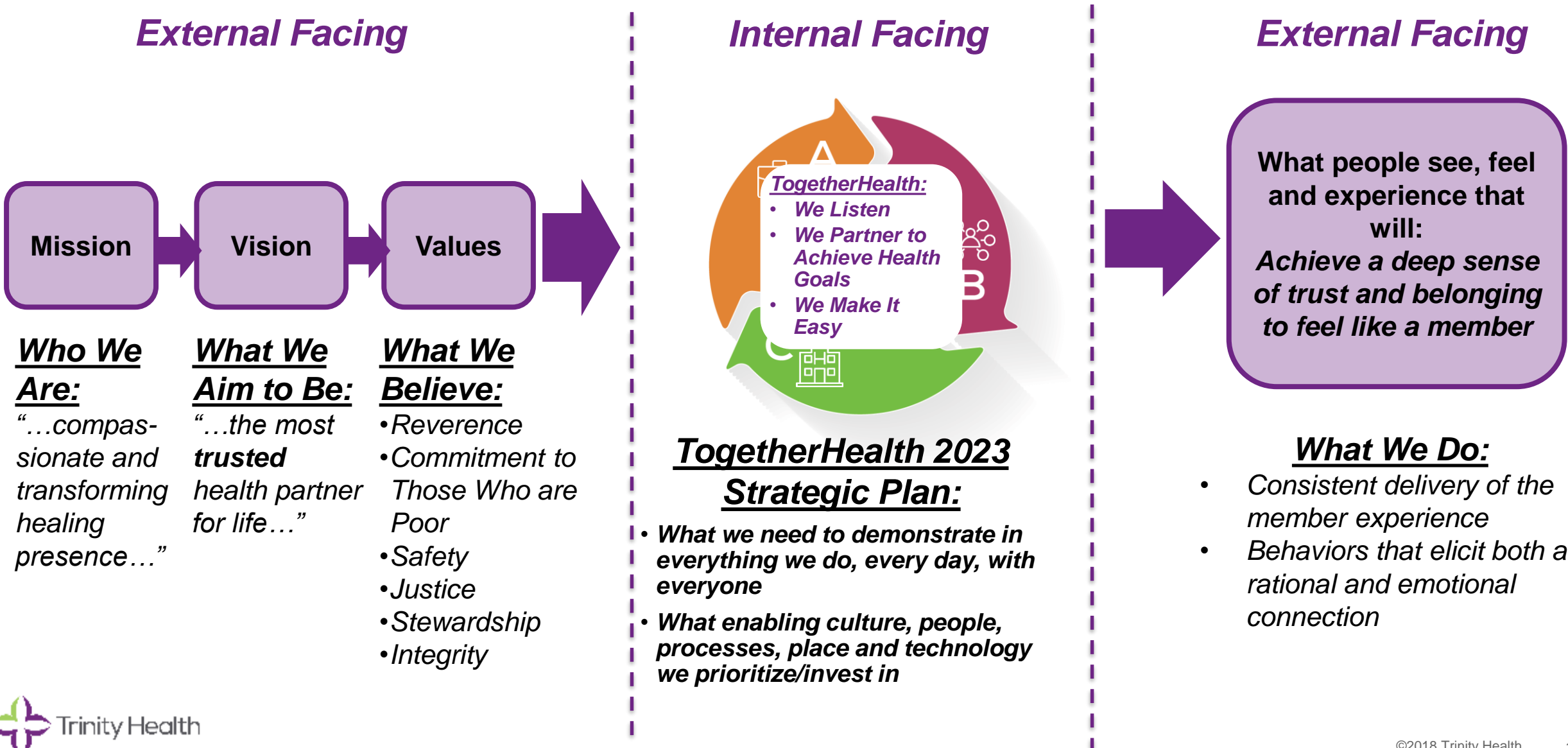
TogetherHealth:

Driving Our Strategy and Culture – To Be *The Most Trusted Health Partner For Life*

Together, our colleagues and physicians serve the people in our communities as **members** of the Trinity Health family. We care for all in body, mind and spirit, demonstrating that:

- We Listen
- We Partner in Achieving Health Goals
- We Make It Easy

TogetherHealth 2023 enables us to translate our vision into actions that earn and sustain member trust.



Top 10 Strategic Implications



1. **Population:** We have to know them better to serve them better
2. **Information:** Access, convenience and ease of use will drive consumer decisions
3. **Integration:** Community health and well-being initiatives will need to be part of the care model
4. **Invasion:** We need to decide whether to compete, acquire or partner with new entrants
5. **Commoditization:** We need to decide how to compete, and get upstream in the healthcare dollar and/or member relationship process
6. **Diversification:** We need to decide which acceptable margin businesses in which to expand
7. **Consolidation:** We need to strategically pursue scale and/or geographic opportunities
8. **Acculturation:** We need to evolve our culture and operating model to adjust to industry changes
9. **Innovation:** We need to perform while we strategically transform
10. **Secularization:** We need to differentiate Catholic Healthcare in the face of an increasingly secular society

Organization Effectiveness Future State Structure and Jobs

- Direction and alignment with OneHR design and Trinity Health strategic priorities
- Jobs / Job Descriptions and Organization Charts

OneHR Process Design Methodology and Milestones



thank you!

Thank you to these and countless other
OE Design contributors from across the system!

OE Design Team	Voice of the Customer	HREC	OneHR Summit Attendees	Strategic Planning
D&I/Member Experience	HRBPs	HRSS	Communications	Finance
Fellows	Performance Excellence	Talent Acquisition	Total Rewards	Colleague & Labor Relations
ELT/MLC	Mission Integration	HR Analytics	Legal	OE Colleagues

Refresher - Creating a National OE Capability

Design model maximizes Trinity Health resource and talent efficiencies

Relieves service areas from design and development of OE programs and processes
while providing more resources and focus on local delivery of broader OE practices

Relieves service areas from essential support work
that transitions to System Office and increases OE strategic support capabilities

Introduces services in organization design and performance objective setting
that were reported as virtually nonexistent in current state

Minimizes OE service disparities
through increasing access to those previously unavailable (ex. NHM)

Leverages economies in scale in OE service provision
for more consistent colleague and manager service experiences

Aligns OE design and services to professional best practices
positioning Trinity Health with competitive internal OE services

High Performing HR Organizations Excel in 5 Key Areas

According to McLean & Company's 2019 HR Trends Report, **these five HR areas were most closely linked with high overall HR effectiveness.**

① **Organization Design & HR Structure**

② **HR Development**

③ **HR Operations**

④ **Change Management**

⑤ **HR Strategy**

Areas are ranked starting with the strongest association.

Organization Design services reported as virtually nonexistent in Trinity Health current state and are a critical capability to strategic priorities (e.g. ASR, Growth Plans, Transformations)

OE design incorporates a targeted focus on 4 of the top 5 areas most closely linked with high overall HR effectiveness/efficiency.

Top 10 HR Key Initiatives for 2019

Top 10 HR key initiatives for 2019

Ranked HR key initiatives for 2019 across all roles

Top 10 Key Initiatives for 2019		Percentage of HR Leaders Prioritizing ¹
Talent Development & All OE Practice Areas →	1 Building critical skills and competencies for the organization	66%
Talent Management →	2 Current and future leadership bench	60%
Culture & Engagement →	3 Employee experience	51%
Organization Design & Change Management →	4 Organizational design and change management	47%
	5 Driving digital business transformation for the organization	37%
	6 Talent analytics	33%
	7 Recruiting	31%
	8 Future of work	30%
	9 Diversity and inclusion	29%
Organization Performance Management →	10 Performance management	27%

OE design incorporates
50% of top industry and
global HR priorities

n = 843 HR leaders

Source: Gartner 2019 Future of HR Survey

¹ This number reflects the percentage of HR leaders who chose each key initiative as critical to achieving their corporate objectives. Leaders could indicate two to five key initiatives for each of their top 3 corporate objectives chosen.



Organization Effectiveness Alignments & Services

OE Future Alignment



Stronger, more comprehensive OE practice areas and services

Future Alignment - OE Practice Areas and Services

SERVICE AREA ORGANIZATION EFFECTIVENESS

- **Organization Effectiveness Service Area Consulting and Advisory**
 - Partner with Service Area (SA) HRBPs and other leaders to align and implement Trinity Health (TH) SA business and Organization Effectiveness (OE) strategies within the SA including talent and organization capability development
 - Provide strategic direction, vision, and guidance in the integration and deployment of Organization Effectiveness (OE) strategies, operations, and services, in order to advance and align organization strategy, structure, talent and systems, and solve complex organization challenges
 - Provides expertise for OE related service adoption, implementation and sustainability for the ministries and business functions across a Service Area
 - Conduct Service Area needs assessments to inform OE strategies
 - Ensure OE Practice Area development addresses SA requirements; Triage TH SA and Practice Area service delivery

Organization Design

“Organization Architecture”

Structure, Process & Job Design

Mergers, Divestitures & Acquisitions

Performance Management
Objective Setting

Organization Development

“Organization Optimization & Sustainability”

Culture & Change Leadership

Colleague Engagement

Executives & Teams:
Advisory & Facilitation



Organization Design

“Organization Architecture”

Organization Design & Development

Organization Development

“Organization Optimization & Sustainability”

Structure, Process & Job Design

Provide advisory and facilitation to produce roadmaps and build internal capability for aligning Trinity Health mission, values, strategy, processes, structures, roles, systems, stakeholders, and culture

Design and align work systems (e.g. job design, work measurement) and operational processes to organization capabilities, systems, job work types

Identify and manage Trinity Health organizationally aligned, structural and job design methodology, process and systems

Provide system level organization and workforce planning

Mergers, Divestitures & Acquisitions

Provide expertise during MD&A discovery, due diligence, implementation, and transition; e.g., capability and competency assessments; organization and job design; and integration, transition, assimilation, and sustainability planning

Performance Management Objective Setting

Provide expertise and guidance focused on system-wide performance management and related HR process design aligned to Trinity Health strategic priorities and capabilities, and objectives cascaded to frontline

Culture & Change Leadership

Provide expertise in the system-level design and architecture of organization culture and in culture risk management and development plans aligned to Trinity Health values, mission and strategic priorities (e.g. culture assessments, recommendations and implementation plans)

Colleague Engagement

Design system-wide colleague engagement strategies, plans and system level supporting infrastructure (e.g. processes, platforms, programs) to optimize colleague engagement and its correlating impact on strategic priorities and organization performance (e.g. safety, financials, patient experience)

Executives & Teams – Advisory & Facilitation

Facilitation and advisory for function and organization-level leaders and their teams (e.g. leader strategy sessions and retreats, senior leadership team formation and interventions, new leader integrations)

Change Management

Design and deliver change management operational capability and discipline (structure, process, tools, plans, governance) to actualize and achieve realization of organization investments, projects and initiatives (i.e. on time, on budget, sustained result) for Trinity Health transformational, incremental and turn-around changes

Provide change management expertise and leadership for large-scale system change (e.g. initial change assessment, sponsor coaching, stakeholder analysis and engagement plan, change acceptance and sustainability strategy, change implementation workplan)

Future Alignment - OE Practice Areas and Services

ORGANIZATION DESIGN & DEVELOPMENT

- **Organization and Job Design**
 - Provide advisory and facilitation services that produce roadmaps and internal deployment capabilities for aligning TH: mission, values, strategy, processes, structures, roles, systems, stakeholders, and culture
 - Design and align work systems, operational processes and job designs to target organization capabilities, work types and systems; Identify and manage macro level, organizationally aligned, job design methodology, process and systems for all Trinity Health jobs
 - Provide macro level organization and workforce planning including change strategies and plans
- **Culture, Change & Engagement and Complementary Organization Development Services**
 - Provide services including and not limited to: organization effectiveness initiative design and consultations; suite of organization assessments; organization transformations and turnaround strategies and plans; and organization-level leader and group facilitation and advisory support
- **Performance Management (Objective Setting Focus)**
 - Provide expertise and advisory focused on enterprise-level performance management (PM) strategy design with alignment to Trinity Health strategic priorities and Organization capabilities, and translatable plan to PM frontline practices
- **Mergers, Divestitures & Acquisitions**
 - Provide expertise and consultation during MD&A discovery, implementation planning and transition e.g. MD&A capability and organization assessments; organization and job design; and integration, transition and sustainability planning

Future Alignment - OE Practice Areas and Services

TALENT MANAGEMENT

- **Career Development**
 - Assist colleague career growth, and build clinical and leadership capability including individual development plans, internships, externships, fellowships, rotations, mentoring and HiPo programs
- **Talent and Succession Planning**
 - Identify and develop people with potential to fill key leadership positions including developing talent policies, and processes for replacement plans, succession plans and talent reviews
- **Organization and Talent Research and Assessments**
 - Manage and administer organization and talent research and assessment tools and processes such as engagement, safety, leadership and functional competency assessments; includes pre-selection assessments and colleague behavioral inventories for development purposes
- **Coaching**
 - Coaching services sourced internally and externally for developing behavioral and leadership competencies, independent of and as part of the performance management process
 - Focused on accelerating growth (verses addressing poor performance)
 - Career coaching for colleagues not in formal leadership roles is an opportunity to expand services

Future Alignment - OE Practice Areas and Services

TALENT DEVELOPMENT STRATEGY & SOLUTIONS

- **Talent Development Strategy and Advisory**
 - Talent development integration with HR value chain and business lines
 - Influences, consults and partners with service partners and business line executive leaders to assess, analyze, solution for and ensure effective implementation of core or functional, job specific talent development solutions (e.g. needs assessments aligned to workforce development priorities, strategic recommendations and business cases, business aligned key performance measurements, change and implementation plans, etc.)
- **Talent Development and Competency Integration**
 - Core and functional / job-specific learning solutions and competency advisory and oversight;
 - Ensures system aligned and integrated core or functional, job specific talent development solutions, including all core or functional, job specific competency related curriculums and development solutions, across Trinity Health service areas the complete HR value chain, and key service partners and business line functional leaders
- **Talent Development Projects and Continuous Improvements**
 - Provides analysis and recommendations for system level talent development efficiencies (e.g. streamlining, standardization, process improvements, etc.).
 - Projects core or functional, job specific competency related performance improvements, cost savings and other business ROI and communicates measurable achievement of benefits for implemented recommendations

Future Alignment - OE Practice Areas and Services

ORGANIZATION EFFECTIVENESS OPERATIONS

- **Organization Effectiveness Operations and Technologies**
 - Provide strategic leadership to support the acquisition and/or design and effective use of Organization Effectiveness system platforms and tools
 - Manage Learning Management System (LMS) (e.g. HealthStream) operational activities, tactical planning and resources including the LMS library
 - Work with internal stakeholders, instructional designers, subject matter experts, and external suppliers, to create learning portals, interactive courseware, multi-media learning materials, performance support, and process and tools for knowledge management and learning exchange
 - Provides business office and workflow management for shared Organization Effectiveness operational needs
- **Learning Experience Design**
 - Consult with leadership, partners and stakeholders to assess and define performance gaps and learning needs, and identify, recommend, design, develop and sustain optimal learning solutions to support organizational strategic plans, leadership and talent development, systems training and system-wide implementations
 - Develop and maintain competency models
- **Learning Program Delivery**
 - Implement, including teaching and facilitation, and evaluate learning experiences including the creation, implementation, and management of event learning delivery processes
 - Contribute to the continuous improvement of individual and group learning experiences, through delivery experience design, maintenance, customization and/or enhancement from delivery planning inception to completion (e.g. from preparatory to post session processes)



Organization Effectiveness Jobs

Funding the OE Future State Staffing Model

↑ = Current to Future State FTE Investment Variance

Significant data reported across the system and resulting analysis provides resources to self-fund the OE future state staffing model through streamlining the service portfolio and how services are provided.

Plans are underway to centralize the OE budget on the front end of implementation. This means all OE colleague jobs and their related job grades will all be budgeted and aligned to System Office.

Stay tuned on the timing for all OE colleagues moving to System Office Payroll.

Jobs / Grades Summary

Specific to OE Service Area

OE Service Area Jobs	System Office Job Code	System Office Job Grade
Director, Organization Effectiveness (Service Area)	T2437, varies	K25, varies
Organization Design & Development Senior Consultant	Varies	15 or 16
<i>National</i>		16
<i>New England / Mid Atlantic</i>		16
<i>Central Midwest</i>		16
<i>West</i>		15
<i>Michigan/S Atlantic</i>		15
Organization Design & Development Consultant	Varies	14 or 15
<i>National</i>		15
<i>New England / Mid Atlantic</i>		15
<i>West</i>		14
<i>Central Midwest</i>		14
<i>Michigan S Atlantic</i>		14
Organization Effectiveness Program Consultant (7.28.20 Update)	T2571	13

Jobs / Grades Summary

Specific to Organization Design & Development

Organization Design & Development Jobs	System Office Job Code	System Office Job Grade
Director Organization Design & Development	T2409	K27
Manager Organization Design & Development Consulting Services	T2488	16
Manager, Organization Design Services	T2489	16
Manager Performance Management Services	T2490	16
Organization Design & Development Senior Consultant	Varies	15 or 16
<i>National</i>		16
<i>New England / Mid Atlantic</i>		16
<i>Central Midwest</i>		16
<i>West</i>		15
<i>Michigan/S Atlantic</i>		15
Organization Design & Development Consultant	Varies	14 or 15
<i>National</i>		15
<i>New England / Mid Atlantic</i>		15
<i>West</i>		14
<i>Central Midwest</i>		14
<i>Michigan S Atlantic</i>		14
Senior Process Design & Content Governance Consultant	T2446	13
Process Design & Content Governance Consultant	T2445	11
Organization Effectiveness Program Consultant (7.28.20 Update)	T2571	13

Jobs / Grades Summary

Specific to Organization Effectiveness Operations

Organization Effectiveness Operations Jobs	System Office Job Code	System Office Job Grade
Director Organization Effectiveness Operations	T2563	K26
Manager Learning Experience Design	T2564	16
Senior Learning Experience Design Consultant	T2565	15
Learning Experience Design Consultant	T2566	13
Manager, Learning Program Delivery	T2567	15
Instructor	T0542	12
Senior Instructor	T0873	13
Lead Instructor	T1638	14
Manager Organization Effectiveness Technologies	T2568	15
Developer Learning Technology	T0527	11
Senior Developer Learning Technology	T0367	13
Lead Developer Learning Technology	T0853	14
LMS Administrator	T2386	10
Senior LMS Administrator	T2387	12
Lead LMS Administrator	T2388	14
Organization Effectiveness Program Consultant (7.28.20 Update)	T2571	13

Jobs / Grades Summary

Specific to Talent Management

Talent Management Jobs	System Office Job Code	System Office Job Grade
Director Talent Management & Career Enrichment	T2569	K26
Senior Talent Management Consultant	T1619	15
Talent Research and Assessment Senior Consultant	T2570	16
Organization Effectiveness Program Consultant (7.28.20 Update)	T2571	13

Jobs / Grades Summary

Specific to Talent Development Strategy; SVP, OE; and HR Specialists

Talent Development Strategy Jobs	System Office Job Code	System Office Job Grade
Director Talent Development Strategy & Solutions	T2561	K25

Office of the SVP, OE Jobs	System Office Job Code	System Office Job Grade
SVP, OE		
Senior Executive Assistant	T0204	11

HR Specialist Jobs	System Office Job Code	System Office Job Grade
HR Specialist	T2572	9
HR Specialist Senior	T2573	10

Organization Effectiveness Charts



OE Structure

without Workforce Planning & HR Administration

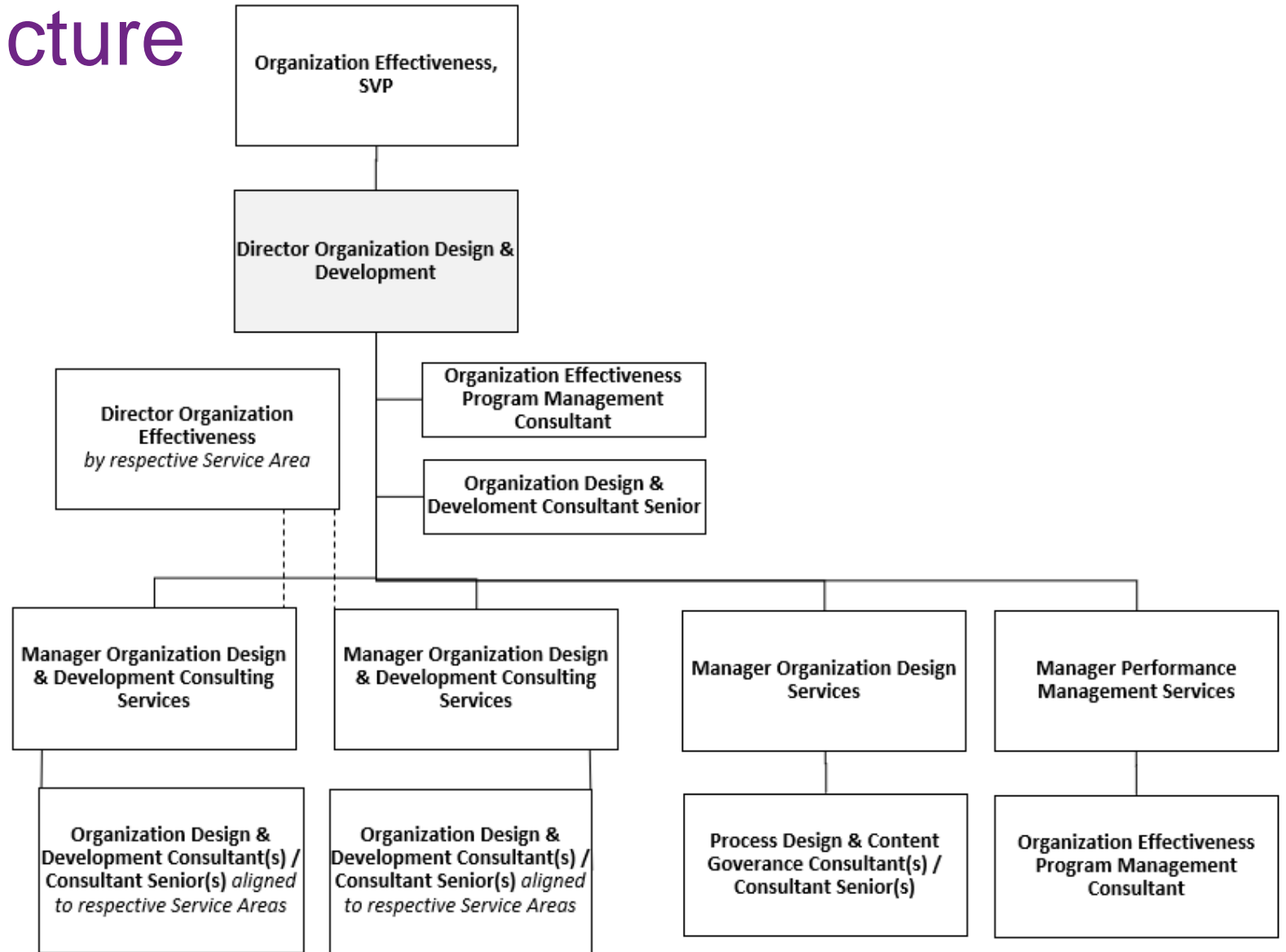


Organization Design & Development Structure

JULY 28, 2020 UPDATE

Organization Effectiveness Program

Management Consultant title to be "Organization Effectiveness Program Consultant"



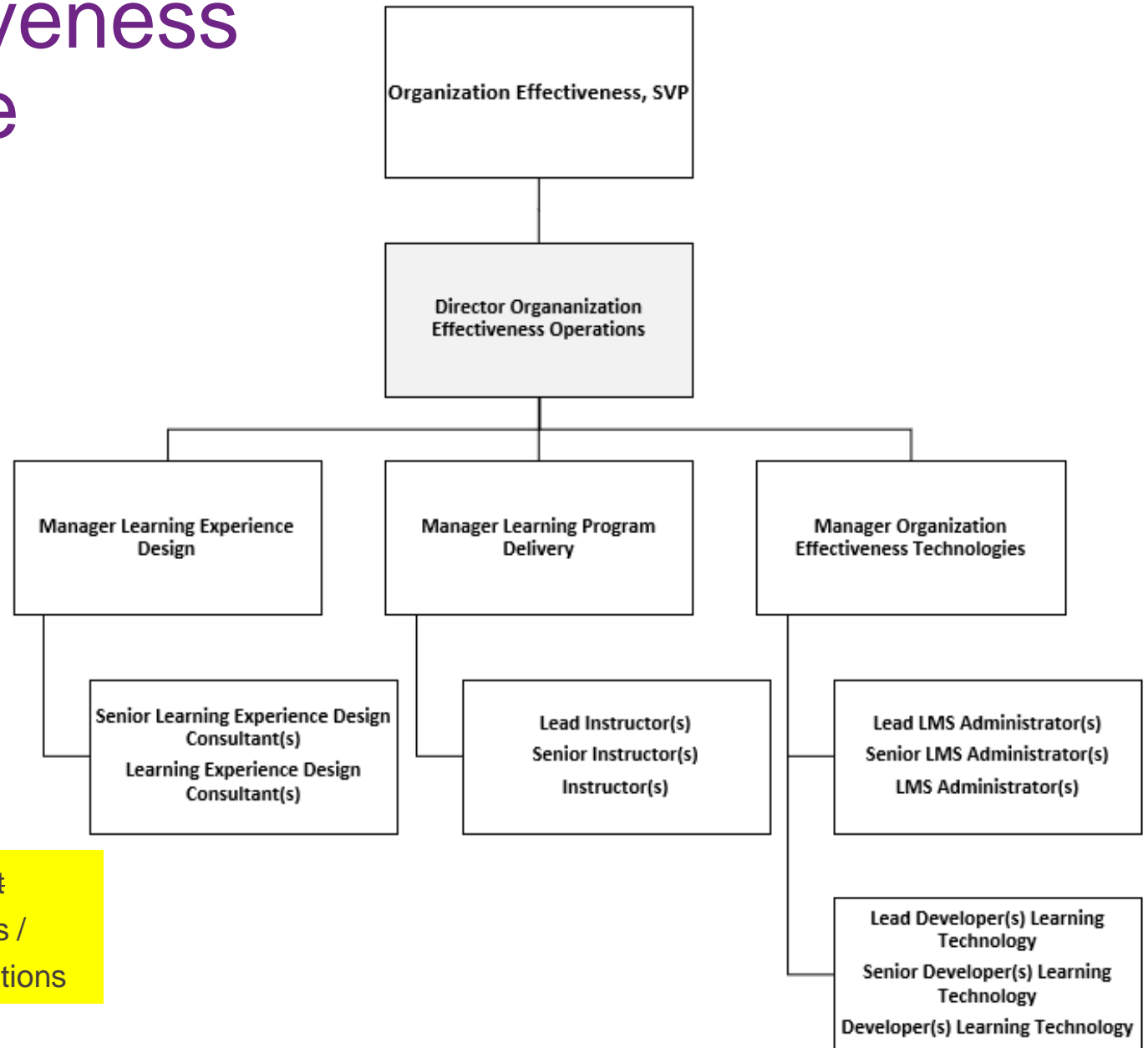
Talent Management & Career Enrichment Structure

JULY 28, 2020 UPDATE

Organization Effectiveness Program
Management Consultant title to be "Organization
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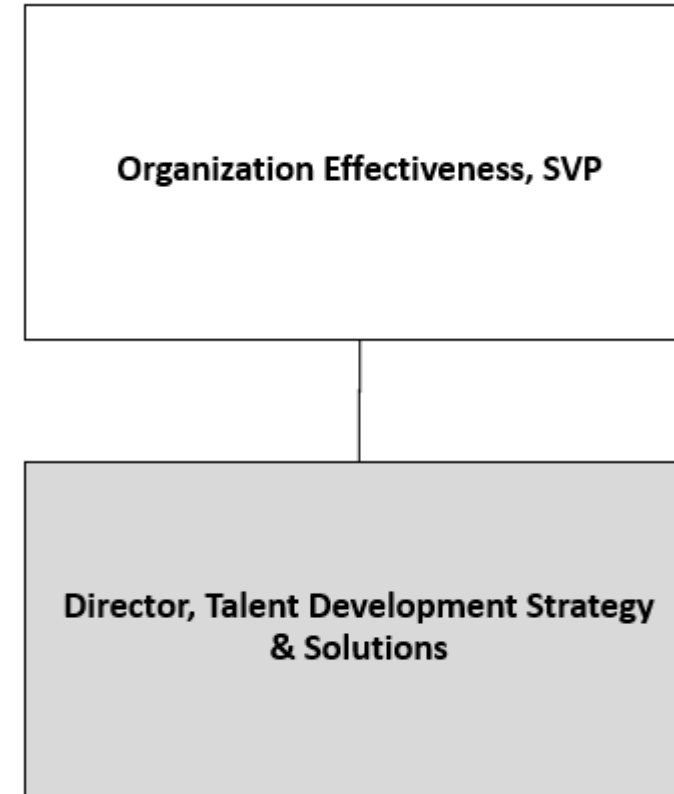


Organization Effectiveness Operations Structure

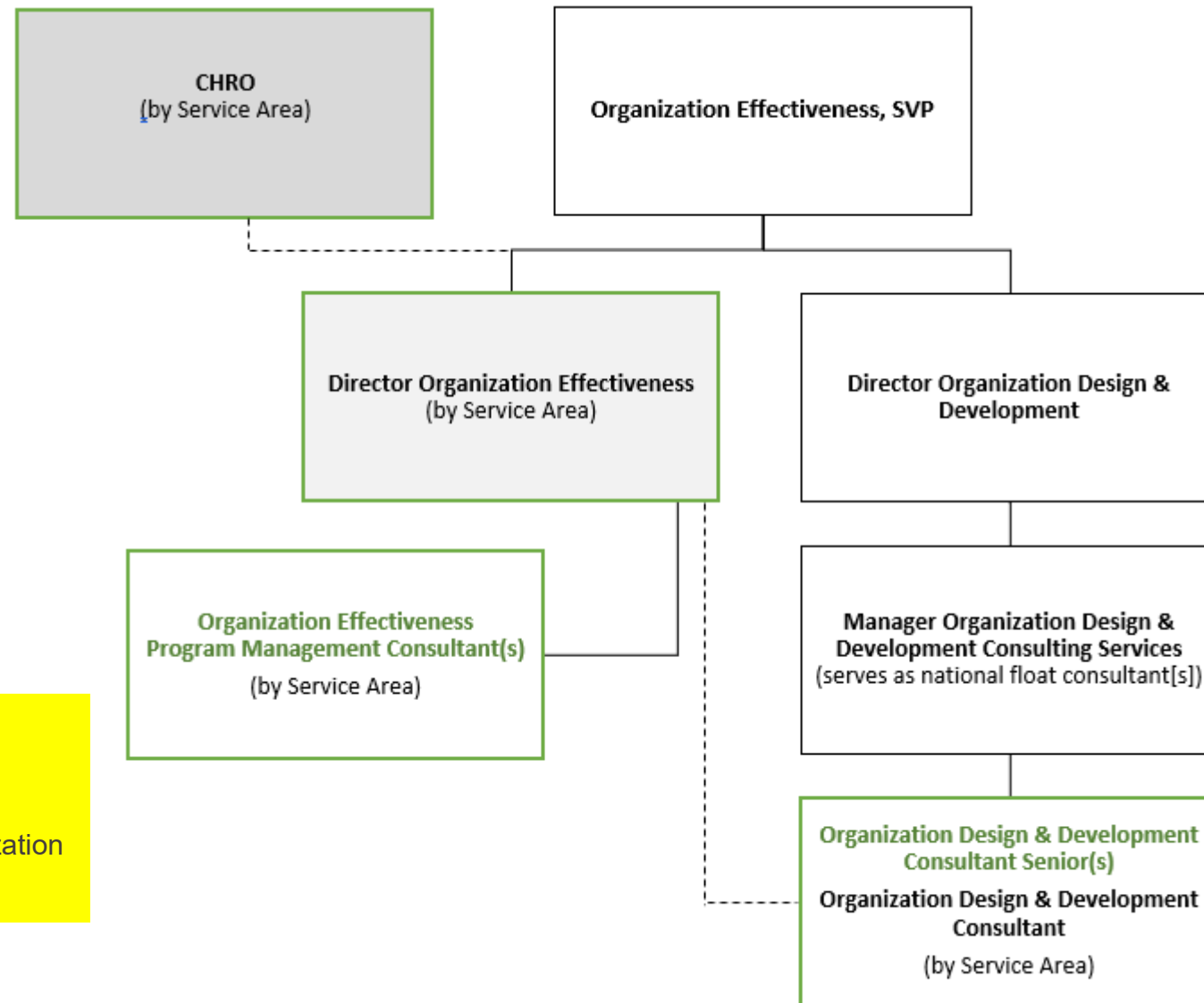


Organization Effectiveness Program Management
Consultants (7.28.20 Update) and/or HR Specialists /
Specialist Seniors may also be represented OE Operations

Talent Development Strategy & Solutions Structure




OE Service Area Structure



JULY 28, 2020 UPDATE

Organization Effectiveness Program
Management Consultant title to be “Organization
Effectiveness Program Consultant”



Job Descriptions

Next Steps

OE Job Opportunity Materials

- Follow-up messaging will provide links to job descriptions, a form where colleagues can express interest in available jobs, and selection process guidelines

Connecting with your leader(s) on OE jobs and career transition preparedness

- Continue communicating with your leader(s) to address your questions and discuss your career interests and options
- Please consider updating your resume and/or Workday profile as needed to support career related conversations

Assurance

Every effort is being made to provide career and redeployment opportunities for Trinity Health colleagues.

And, when this is not possible, to provide transition support.

Next Steps

Self-Care

This is an exciting time for OE as we expand our collective reach, services, and impact. Such change can be incredibly challenging – even for experts in change – especially given ongoing work and personal demands and priorities in COVID-19 dominant environments.

Please consider how you can leverage TH resources to support your self-care and wellbeing:

- Live Your Whole Life - <http://mybenefits.trinity-health.org/live-your-whole-life>
- Employee Assistance Program - <http://mybenefits.trinity-health.org/eap>



TogetherHealth:

Driving Our Strategy and Culture

- To Be *The Most Trusted Health Partner For Life*

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- **We Listen**
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① Remaining Questions & Comments

② Appreciation & Close

