HR Service Delivery

Weekly Status Report

06/09 - 6/16/2025

UC RIVERSIDE

© Cask NX, LLC. All rights reserved. The Cask name and logo are registered trademarks. All content contained in this document is protected by copyright laws, and may not be reproduced, republished, distributed, transmitted, displayed, broadcast or otherwise exploited in any manner without the express prior written permission of Cask.

HRSD Phase 1

OVERALL STATUS: GREEN

Element	Status	Comment
Scope	GREEN	No changes since Kick-off
Schedule	GREEN	Adjustments accommodate without impact
Budget	GREEN	No Impact to Date
Resources	GREEN	Additional Cask Resources added 6/9

CURRENT WEEK'S ACCOMPLISHMENTS

- All Current State Assessment sessions have completed
- Discover Phase Gate cleared with approval to proceed into Design Phase
- Swap of Sprints and Reviews (demos) for Comp & Class services
- Additional resources onboarded (Process Consultant & Developer)

ADDITIONAL INFO

- Possible additional sessions in upcoming week(s) to accommodate possible overage for both the Contract Review and the Policy Salary Review workstreams
- New Risk Raised as to the short timeline for training.

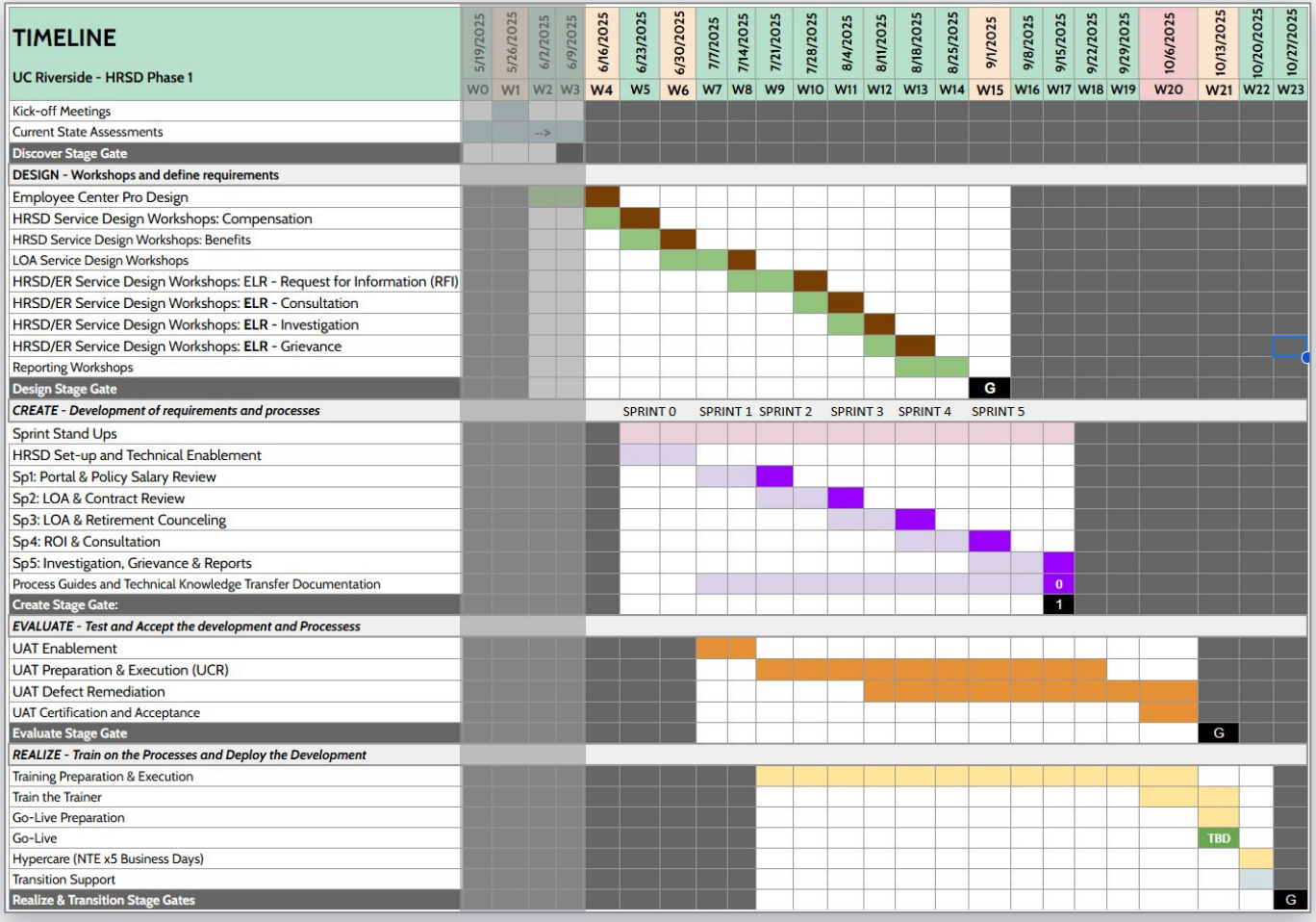
© Cask NX, LLC. All rights reserved. Disclosure is subject to the restriction on the title page of this document.

Upcoming Meetings

Comp	**Contract Review Design Workshop**	Working session to review system capabilities and define requirements for the new services to be built.	**6/16 @ 10:30am PT**
Program	**HR Leave Admin**	A Session for the overall program leads to discuss current state	**Tuesdays @ 10am PT**
Comp	**Policy Salary Review Design Workshop**	Working session to review system capabilities and define requirements for the new services to be built.	**6/17 @ 1:30pm PT**
Portal	**UI Design Theme Review & Approval**	Cask UX/UI designer to provide Design Theme options for UCR to determine how they would like their brand to be best represented (color, logo, imagery, layout, etc) within the context of the EC Pro user portal.	**6/11 @ 10:30am PT**
HOLIDAY 6/19		**Juneteenth**	
IT	**Sprint 0 Refinement: Technical Enablement of HRSD**	Sprint Refinement of all available stories. Discuss any questions, additional requirements required, etc.	**6/20 @ 11am PT**

© Cask NX, LLC. All rights reserved. Disclosure is subject to the restriction on the title page of this document.

Project Timeline



© Cask NX, LLC. All rights reserved. Disclosure is subject to the restriction on the title page of this document.

Cask

Thank you!

© Cask NX, LLC. All rights reserved. Disclosure is subject to the restriction on the title page of this document.

Cask

Appendix

© Cask NX, LLC. All rights reserved. Disclosure is subject to the restriction on the title page of this document.

The Why: Key Benefits

The implementation of ServiceNow Employee Workflow, including HR Service Delivery, Leave of Absence management, and the Employee Center Portal, will enable UC Riverside to modernize its HR operations and enhance employee experiences. By transitioning from manual, email-based, and spreadsheet-driven processes to a unified and automated platform, UC Riverside will achieve operational efficiency, data accuracy, and improved accessibility for its workforce.

1 Streamlined HR Service Delivery

ServiceNow's HR Service Delivery will centralize and automate HR tasks, reducing administrative burdens, eliminating silos, and ensuring timely resolution of employee inquiries. This will foster better communication and responsiveness across departments.

2 Efficient Leave of Absence Management

The Leave of Absence module will simplify the process of managing employee leaves by automating workflows, ensuring compliance with UC Riverside policies, and improving transparency for employees and HR staff. Employees will have access to real-time updates, while HR gains insights through detailed analytics to optimize workforce planning.

3 Enhanced Employee Experience with the Employee Center Portal

The Employee Center Portal provides a user-friendly platform for employees to access personalized resources, request services, and find information. This self-service tool reduces dependency on HR staff for routine tasks, empowering employees and enhancing satisfaction.

4 Improved Compliance and Reporting

ServiceNow ensures that processes adhere to regulatory and institutional requirements. Robust reporting capabilities will support data-driven decision-making and simplify audits.

5 Cost Savings and Scalability

By automating repetitive tasks and reducing reliance on manual interventions, UC Riverside can achieve long-term cost savings. The scalable platform will grow alongside the institution, accommodating future needs seamlessly.

ServiceNow Employee Workflow represents a transformative step forward for UC Riverside, enabling the institution to foster a supportive, efficient, and engaging work environment for its employees while aligning with strategic goals of operational excellence.

© Cask NX, LLC. All rights reserved. Disclosure is subject to the restriction on the title page of this document.

The What: Scope for Phase 1

Non-customized implementation of HR Service Delivery,
to lay the foundation for including other HR teams into ServiceNow in future Phases.

Implement HR Case Management with Agent Workspace	HR Profile (Data Load) & Reporting	Employee Center Pro (Portal)	Leave of Absence (LOA)

HRSD Services

Contracts Review | Policy Salary Review | Retirement Counseling

HRSD / Employee Relations Services

Request for Information (RFI) | Investigation | Grievance | Consultation

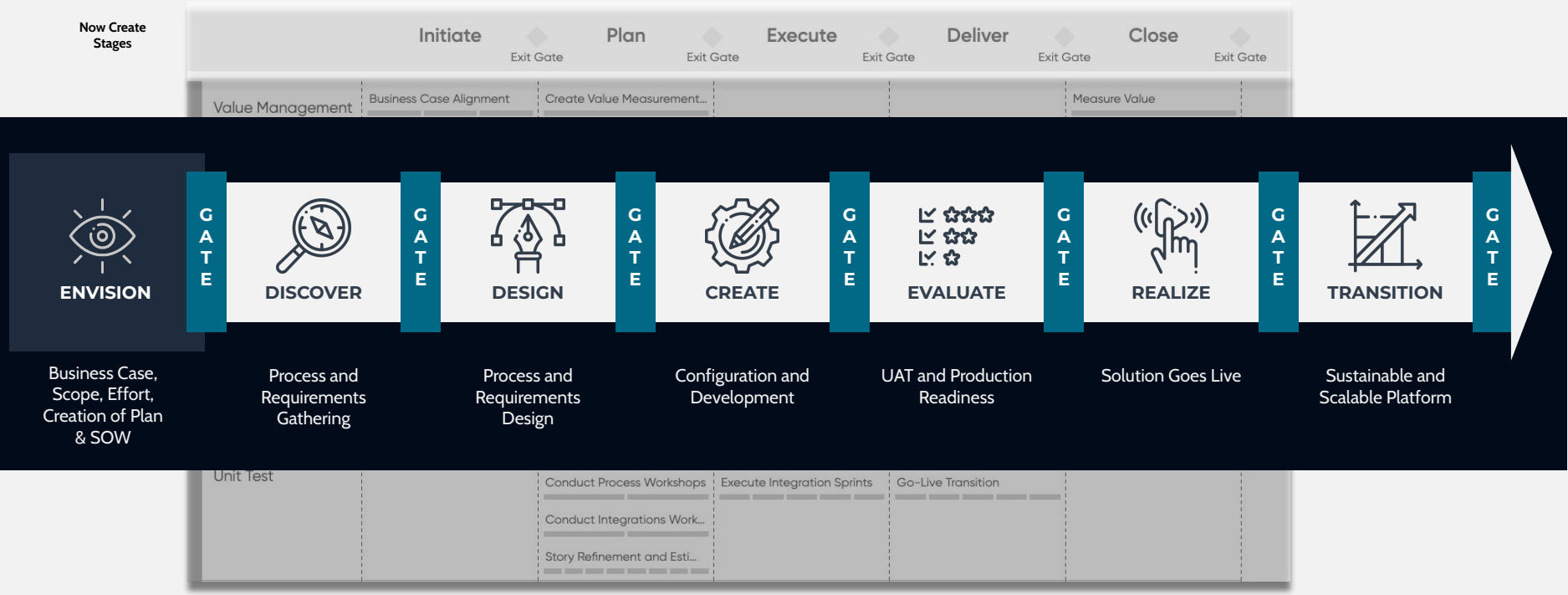
Ten (10) workflow tasks
No Custom Tables
Three (3) workflow branches
Five (5) approval steps
Basic notification adjustments
Moderately complex UI Policies

All work must fit within designated sprints

© Cask NX, LLC. All rights reserved. Disclosure is subject to the restriction on the title page of this document.

Cask's Value Delivery Model

Aligned to the ServiceNow Now Create model, we implement using the **Cask Value Delivery Model (CVDM)**



© Cask NX, LLC. All rights reserved. Disclosure is subject to the restriction on the title page of this document.

Proposed Timeline

Meeting Attendance is currently being communicated to all teams.

Phase	Est. Duration	Start	End	Cask Participants	UCR Participants
Engagement & PM	32 Weeks	4/14	12/21*	Engagement Manager Delivery & Governance Teams	Program Team
Discover	2 weeks	5/27	6/8	UX / UI Designers Business Process Consultant	All Project Members
Design	14 weeks	2/24	9/7	UX / UI Designer Business Process Consultant Architect	Workstream Leads Program Team Key SME(s)
Create	13 weeks	6/23	9/21	Architect Developers Business Process Consultant	Workstream Leads Developer Program Team Testers
Evaluate	14 weeks	7/7	10/12	Architect Developers Business Process Consultant	Workstream Leads Program Team Developer Testers
Realize	15 weeks	7/21	11/1	Architect Developers Business Process Consultant	Workstream Leads Program Team Developer Trainers Testers

* *Pending change order as agreed on 5/28*

Cask

© Cask NX, LLC. All rights reserved. Disclosure is subject to the restriction on the title page of this document.

Assumptions & Dependency Awareness

Title	Type	Details
Three (3) Day Turn Around	Assumption	To ensure project activities remain on time, UC Riverside will provide timely review, within three (3) business days, of any work product (e.g. draft Process Guides, user stories, training materials). Any delay in this review due to UC Riverside availability and/or participation that significantly impacts project progress and resource utilization may prompt Cask to stop work.
Five (5) Day Approval window	Dependency	UC Riverside will provide timely acceptance, within five (5) business days, for any formal deliverables described in the Statement of Work. If there is no formal acceptance within this timeframe after two (2) documented attempts the deliverable will be deemed accepted.
Stakeholder availability	Assumption/ Dependency	UCR resource availability for workshops and offline homework as per the Project Schedule. UC Riverside is responsible for any delays to the project schedule, including increased cost, by failure to provide timely access documentation or attend workshops or provide decisions required for the project
Project support	Assumption	UCR has secured leadership buy-in on the value of best practices and process changes required to implement the scoped services
Decision Authority	Dependency	UCR has clearly defined project governance and decision authority for story, requirement, and demo approval. Formal approvals must be granted within five (5) days post deliverable submission, preferably sooner.
Gate Signoff	Dependency	Cask CVDM Delivery Model has Stage Gates that require formal sign off from UCR project leadership, without which the project cannot proceed.
System Integrations	Assumption	There are no integrations or integration efforts in scope for this engagement. Any changes would require a for-cost change order.
System data validation	Assumption	UCR is be responsible for the accuracy and completeness of any data being imported into ServiceNow.

© Cask NX, LLC. All rights reserved. Disclosure is subject to the restriction on the title page of this document.

Assumptions & Dependency Awareness

Title	Type	Details
User Acceptance Testing	Assumption	UAT Management & Script Creation is the responsibility UCR. Test scripts will leverage user acceptance criteria written by Cask during the development and test cycle. All testing must complete within five (5) days
Licences	Assumption	UCR has all licences required for this engagement.
Environment Clone	Dependency	UC Riverside will clone the production environment over the Development environment before any development work will be commenced by Cask.
Environment Access	Dependency	Cask must have full access to the ServiceNow environments (Dev, UAT/Test, and limited Production) from Day 1: 5/27
Environment Continuity	Dependency	UC Riverside will notify Cask in advance of any planned changes to the ServiceNow System and or Platform. These changes include but are not limited to: • Code changes, cloning in or out of the environment, installation of patches/upgrades. • Cask and UC Riverside will need to have mutual agreement on the date/time of any ServiceNow system or platform changes to ensure that the changes do not impact this engagement.
Data Format and submissions	Dependency	UC Riverside will supply all data to be imported in a ServiceNow supported format (e.g. XML, delimited text file) where applicable
Data cleansing and quality	Dependency	UC Riverside will be responsible for any data cleansing, alterations, and/or validation required as part of the engagement.
Organizational Change Management	Dependency	UC Riverside will be responsible for the communication plan and organizational change management to drive adoption of the changes to processes and technology as part of this engagement.
Work Locations	Assumption	All work will be completed remotely.

© Cask NX, LLC. All rights reserved. Disclosure is subject to the restriction on the title page of this document.

Assumptions & Dependency Awareness

Title	Type	Details
Role based permissions	Assumption	UC Riverside will utilize the standard ServiceNow role and object-based access control model for securing individual data elements, records, and tables to the appropriate logged in user.
IP Based Access	Assumption	IP-based access controls are out of scope for this engagement.
Global Resources	Assumption	Project budget is reliant on the greater Global team at Cask. This includes Cask personnel, affiliates, subcontractors, etc, primarily based anywhere in North America, Mexico and Brazil.
Possible Use of Sub-Contractors	Dependency	UC Riverside has been made aware, and pre-approves the potential use of subcontractors in the provision of services under this agreement.
Travel	Assumption	There is no travel expected as part of this engagement
Schedule Lock	Dependency	Once the project plan has been agreed to by the UC Riverside, the dates associated with the plan are considered final.

© Cask NX, LLC. All rights reserved. Disclosure is subject to the restriction on the title page of this document.

Risk Awareness

Title	Level	Type	Details	Mitigation
Complexity of Services	High	Risk	Should the complexity of services eclipse the allowance of either Sprint Capacity or agreed medium complexity, then scope from other services will have be be reduced to accommodate.	UC Riverside HR teams are aware of the need to modify their processes and procedures as part of this engagement.
Resource Availability	High	Risk	Should Key resources (process owners, decision makers, or their alternates) not be available for scheduled sessions, this will require a re-baselining of the schedule and all activities at cost or negative impact to the scope of services that can be completed.	Decision makers should identify alternates and prep/empower them to make decisions in their absence.
Duplication of efforts due to federation of teams	High	Risk	If activities (sessions, documentation, etc) are required to be duplicated due to delineation of teams and/or workstream, this will have an inversely negative impact on either the scope that can be delivered, or the overall cost of the engagement.	Duplication of sessions will require discussion at the program level for remediation and agreement.
Prior Knowledge of Black-Out dates, Code freezes, Upgrades, or patches	Medium	Risk	If changes are made to the ServiceNow environments, or Cask Team's access without mutual consent, the project timeline and costs or deliverable scope will be negatively impacted	All such dates are to be identified prior to Kick-Off, and any changes to schedule related to same to be escalated to the governing body
Delay in Deliverable Approvals due to multiple approvals required	High	Risk	If there is no formal acceptance within the five (5) day approval timeframe after two (2) documented attempts the deliverable will be deemed accepted.	Manage the turn around via Action Item tracking, and appropriate communication of deadlines

© Cask NX, LLC. All rights reserved. Disclosure is subject to the restriction on the title page of this document.

Risk Awareness

Title	Level	Type	Details	Mitigation
Delay in review	High	Risk	If at any time there is a delay in timely review of product due to UC Riverside availability and/or participation that significantly impacts project progress and resource utilization may prompt a halt to the engagement.	Manage the turn around via Action Item tracking, and appropriate communication of deadlines
Hypercare	Medium	Risk	If UCR requires additional time to Hypercare (beyond the five (5) business days allotted), then a change order for additional funding will be requested	Approval of the scheduling includes this timeframe, as well as the understanding that additional time for this activity cannot be changed without mutual consent of the Governing body

© Cask NX, LLC. All rights reserved. Disclosure is subject to the restriction on the title page of this document.