# Knight Vision
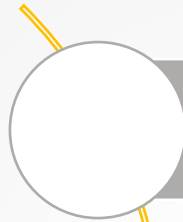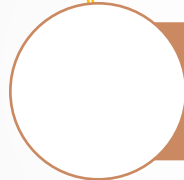# Open Forum
September 7, 2021

# Agenda

- Knight Vision Program
- Service Enhancement Transformation
- Questions & Answers

# Knight Vision Program

# Knight Vision Guiding Principles

**Simplification & Standardization**

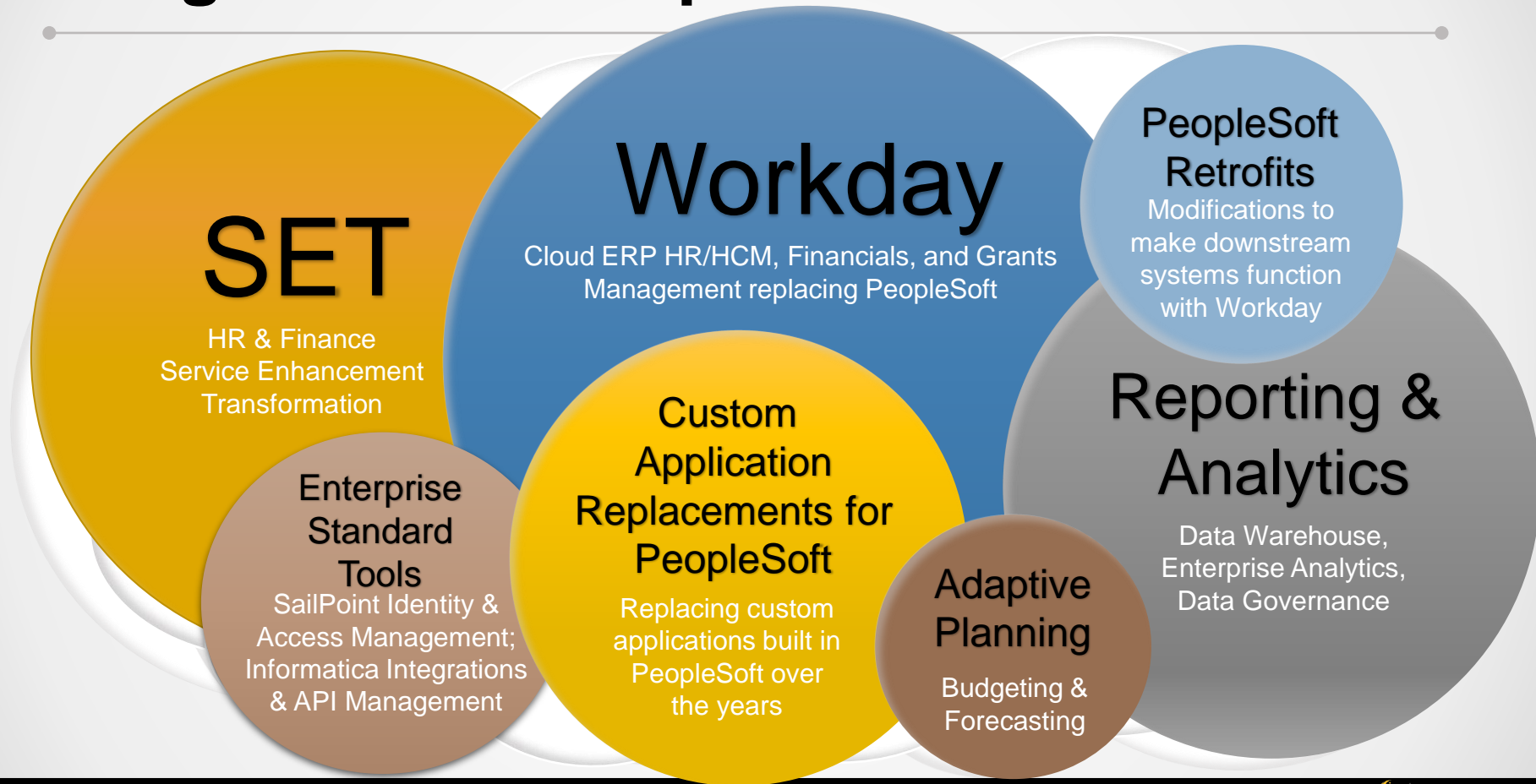**Transformative Change**

**Measurable Results**

**Transparent & Inclusive**

**Enhanced Accountability**

# Knight Vision Scope

**SET**

HR & Finance Service Enhancement Transformation

**Workday**

Cloud ERP HR/HCM, Financials, and Grants Management replacing PeopleSoft

**PeopleSoft Retrofits**

Modifications to make downstream systems function with Workday

**Enterprise Standard Tools**

SailPoint Identity & Access Management; Informatica Integrations & API Management

**Custom Application Replacements for PeopleSoft**

Replacing custom applications built in PeopleSoft over the years

**Adaptive Planning**

Budgeting & Forecasting

**Reporting & Analytics**

Data Warehouse, Enterprise Analytics, Data Governance

# Knight Vision Mission and SET

## SET

HR & Finance
Service Enhancement Transformation

**Improving the Employee Experience**

**Improving the Customer Experience**

*Knight Vision Mission*

*Transform the way UCF works through transparent, efficient, and compliant best practices and state-of-the-art technologies to enhance services and business outcomes supporting excellence in education and research.*

# SET Spotlight Presenters

**Gerald L. Hector**
*Senior Vice President of Administration and Finance and Chief Financial Officer (CFO)*
*SET Executive Sponsor*

**Michael Johnson**
*Interim Provost and Vice President for Academic Affairs*

**Maureen Binder**
*Associate Vice President, Human Resources and Chief Human Resources Officer (CHRO)*
*SET Leader*
*BOC Member*

**Mike Sink**
*Associate Vice President and Deputy CIO*
*BOC Chair*

**Misty Shepherd**
*Senior Associate Vice President for Financial Affairs*
*SET Leader*
*ESC Member*

**Cherie Herrin**
*Knight Vision Program Director*

**Joel Levenson**
*Assistant Vice President for Tax, Payables & Procurement*
*SET Procurement Leader*

**Seresa Cruz**
*Director, HR & Finance*
*SET Advisory Council*
*Chair CCAG*
*BOC Member*

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# What is SET?

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# What is SET (Service Enhancement Transformation)

## Customer Service-Oriented
Provide consistent and high-quality service that aligns to university needs and is accessible for UCF stakeholders.

## Clear Accountability
Ensure transparency with clearly defined structures and metrics for accountability.

## Improved Quality & Compliance
Strive for excellence and accuracy in HR & Finance service interactions while reducing risk from non-compliant processes and practices.

## University-wide Consistency
Establish common processes and defined roles to create additional opportunities for university-wide alignment and support.

## Clear Career Paths
Enhance employees' career paths and attract the best talent and skills by redistributing workloads and providing training support.

## Enhanced Use of Technology
Leverage Workday and other technologies through automation to refocus resources on mission-centric activities like research and instruction.

# Why are we moving forward with SET?
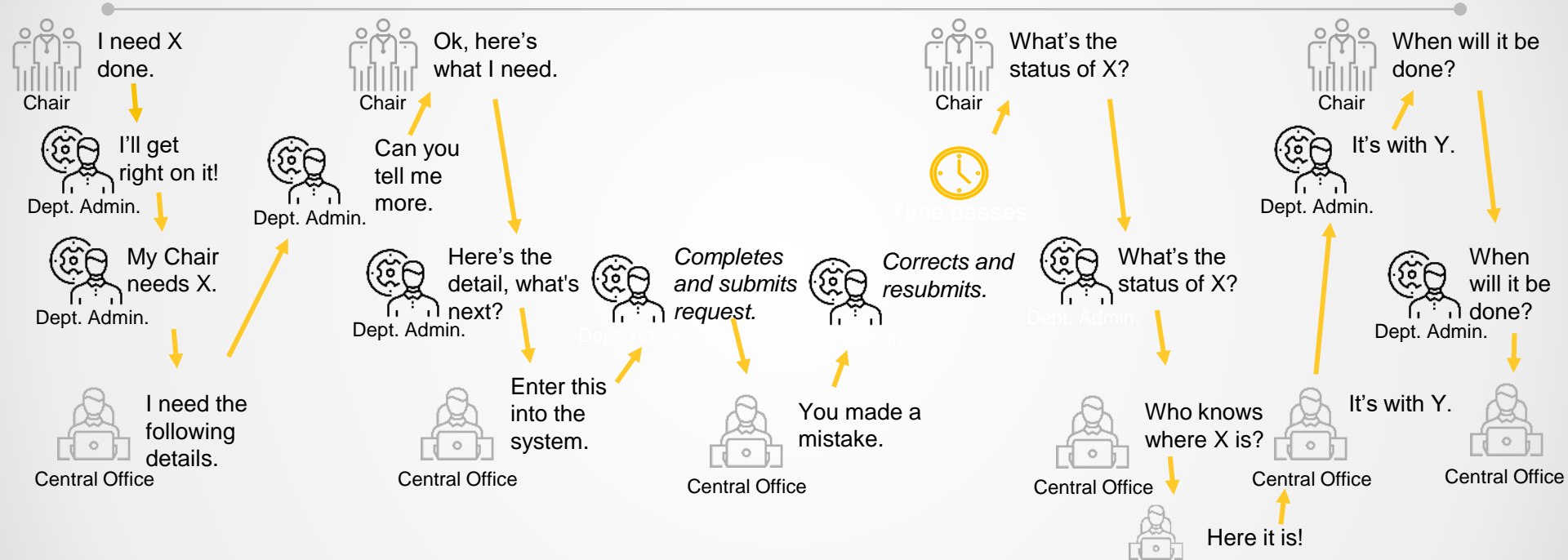
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# Achieving Mission Excellence

"UCF Aspires to be one of the nation's, and the world's, **leading public metropolitan research universities**. With the introduction of Knight Vision, it's clear we're moving in the right direction. This program will provide a **pathway to excellence by improving our administrative infrastructure systems** that drive operational excellence, efficiency, and effectiveness."

**Alexander N. Cartwright**
President

# Current State of Finance & HR Work

Illustrative

Below is an illustration of what work looks like today at UCF.  This is frustrating for everyone involved.
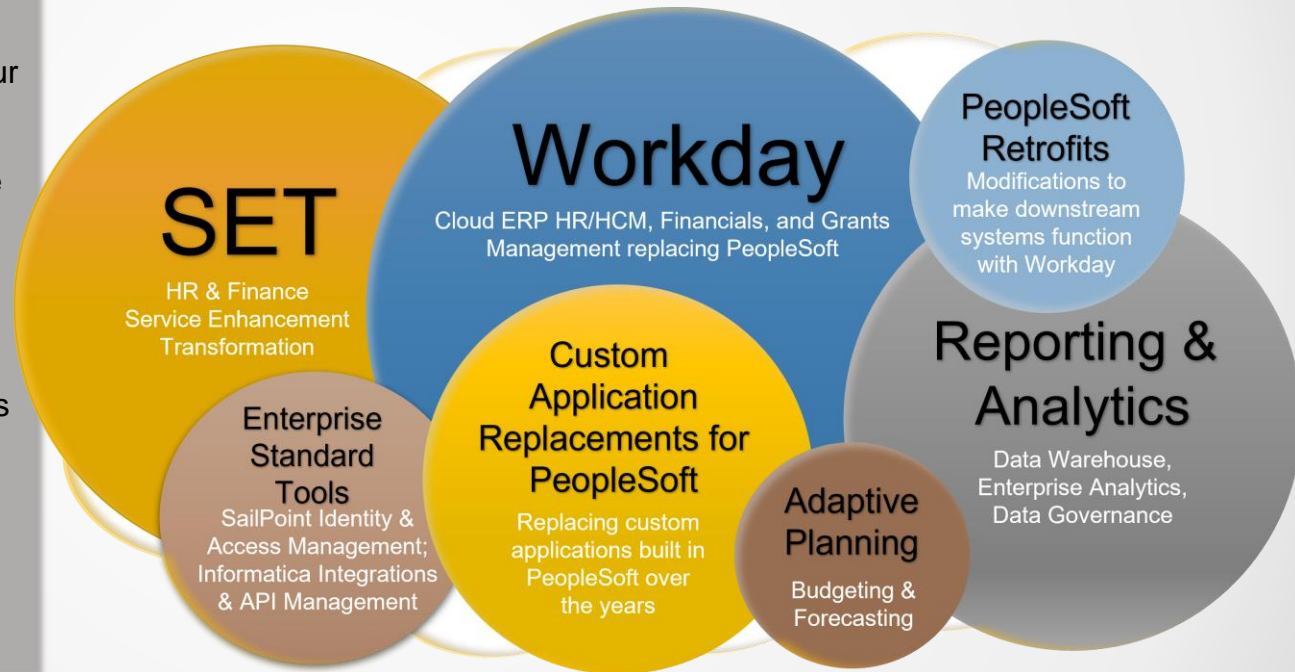


*It's not the people, it's the process!*

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# How does SET connect with Knight Vision & Workday?

# Knight Vision Connection

## Service Enhancement Transformation is an important element of Knight Vision

- The technology upgrades will completely transform how we do our work.

- Roles and Responsibilities must be aligned with Workday security and processes, specifically around initiation and approval.

- Specialized roles can be empowered with reduced approvals and more permissions within the system.

- Specialized roles allow for focused training and support.

**SET**
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# What was the SET model decision?

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# SET Operating Model

**The SET design for UCF will unify the majority of finance and HR activity at the college and division level.**

**Central offices will be connected to the college and division staff** for functional accountability and to provide the **support, training, and development** opportunities they will need to succeed.

**Business Centers + HR & Academic Resource Centers**

**Central Offices**
- **Finance**
- **Office of Research**
- **Human Resources**
- **Prov...**

**Administrative Service Center**

The Administrative Service Center will provide
- Customer **support for employees and Workday self-service support**
- Backup support for colleges and divisions
- Select high volume transactions for the institution

# SET Operating Model

The SET design for UCF will unify the majority of finance and HR activity at the college and division level.



ONE

UNIVERSITY OF CENTRAL FLORIDA

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# What is <u>in</u> and <u>out</u> of scope for SET

## IN SCOPE EXAMPLES

**ONLY** – HR, Finance, Procurement, Payroll activity, and Post-Award research

**Finance & Procurement**
- Department budget
- Purchases and travel
- Reporting and financial tracking
- Post-Award research

**Human Resources**
- Employment lifecycle (hire to retire)
- Personnel changes (Staff, faculty, student, GA, Post Doc, residents, temps)
- Benefits, Payroll, leave
- Search Coordinator(s)

## OUT OF SCOPE EXAMPLES

- **Department's operating decisions** – managing the front desk, printing/copying, etc.

- **Local administrative support needs**, chair and faculty administrative support, class scheduling, academic support, ordering textbooks, meeting minutes, etc.

- **Manager responsibilities** – performance, time keeping, leave approvals, ensure employees take manditory training, etc.

- **Chair's responsibilities for faculty** – Assignment of Duties, evaluations, tenure review, etc.

# College / Division Centers

**FINANCE BUSINESS CENTERS**

**HR & ACADEMIC RESOURCE CENTERS**

**Finance/Budget Director**

**HR Director**

**Finance/Budget Partner(s)**
**Post Award Grant**
**Administrator(s)**

**HR Partner(s)**

**Travel/Procurement**
**Coordinator(s)**

**HR**
**Coordinator(s)**

## Illustrative

- *These are roles not final positions or titles*
- *This does not indicate the exact number of roles*
- *Some roles may be combined based on size of supported area*

# How was the decision made?

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# Decision Making Matrix

| STAKEHOLDERS > | Executive Sponsors | President's Cabinet | Deans & Provost | Advisory Committee | SET Team | KV Team | CSUAC | CCAG | Budget Directors | Central HR & Finance | HR Advisors | Impacted Campus Stakeholders |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Key Decisions** | | | | | | | | | | | | |
| **Implementation timeline** | A | I | I | I | R | R | I | I | I | I | I | I |
| **Determine organizational model** | A | C | C | C | R | C | I | I | I | C | I | I |
| **Determine SET services** | A | C | C | C | R | C | I | I | I | C | I | I |
| **Structures and reporting** | A | C | C | C | R | C | I | I | I | C | I | I |
| **Workday process design** | A | I | I | I | C | R | C | C | I | C | I | I |
| **Workforce transition strategy** | A | C | C | C | R | C | I | I | I | I | I | I |

| Definitions for Decision Matrix | | |
|---|---|---|
| R | R - Responsible | • Evaluates options and makes recommendations |
| A | A - Accountable | • Makes the final decision and accountable for decisions made |
| C | C- Consulted | • Provide input on decisions from their domain of expertise or organizational interest |
| I | I - Informed | • Stakeholders who should be kept in the loop on decisions made |

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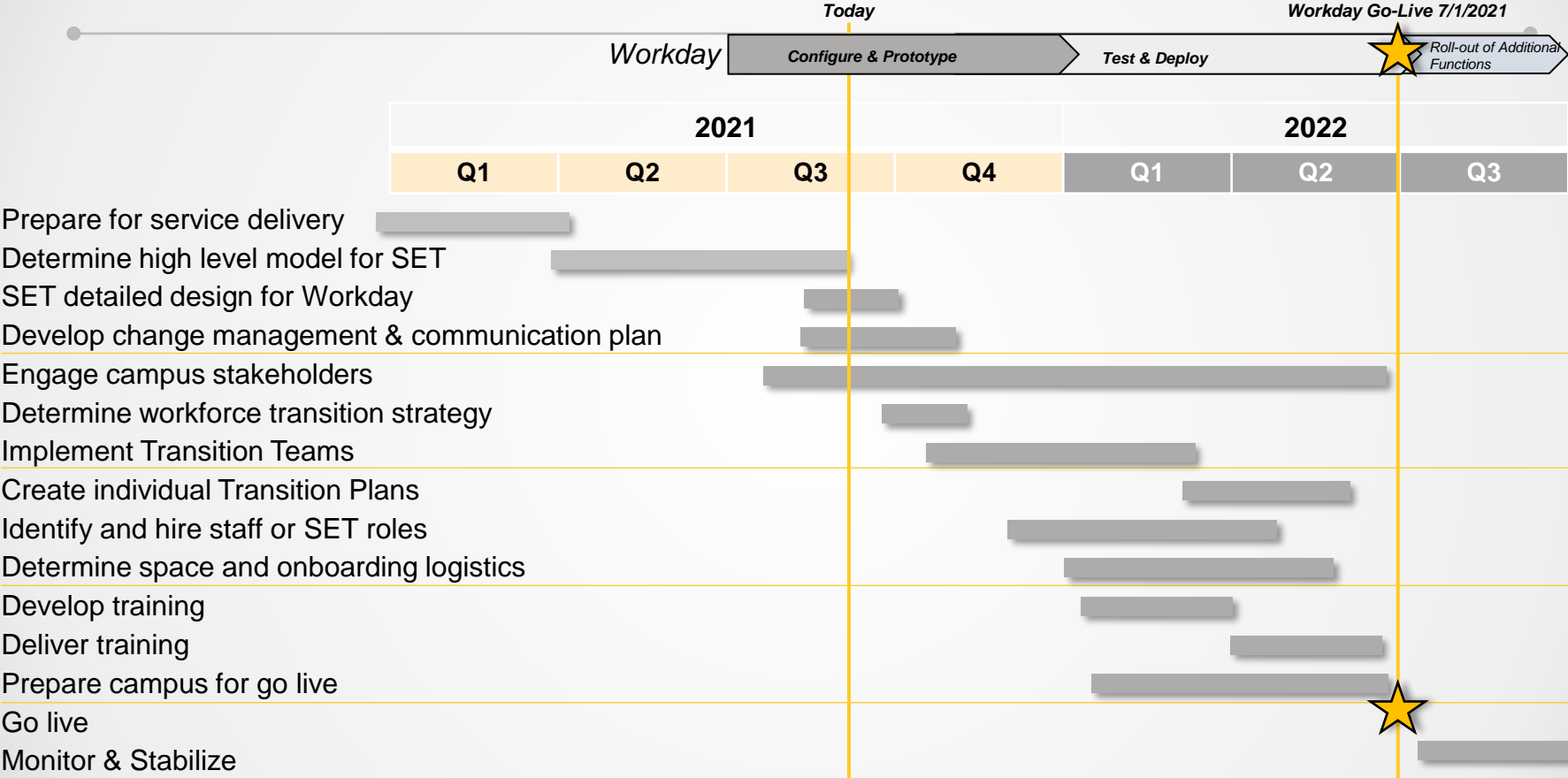
# What is the plan?

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# We Are Just Getting Started

## Next Steps

- Build out the SET model details; roles, responsibilities, staffing numbers

- Configure roles and responsibilities into Workday processes

- Create a robust communication plan

- Develop the Workforce Transition Plan

- Identify and charge Transition Teams

- Continue to engage stakeholders and answer key questions

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# Set Implementation Plan

Workday Go-Live 7/1/2021

*Workday* | **Configure & Prototype** | **Test & Deploy** | Roll-out of Additional Functions

| | 2021 | | | | 2022 | | |
|---|---|---|---|---|---|---|---|
| | Q1 | Q2 | Q3 | Q4 | Q1 | Q2 | Q3 |

- Prepare for service delivery
- Determine high level model for SET
- SET detailed design for Workday
- Develop change management & communication plan
- Engage campus stakeholders
- Determine workforce transition strategy
- Implement Transition Teams
- Create individual Transition Plans
- Identify and hire staff or SET roles
- Determine space and onboarding logistics
- Develop training
- Deliver training
- Prepare campus for go live
- Go live
- Monitor & Stabilize

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# Our Commitment to You

## Every decision is made with our employees in mind

We understand our workforce is our most valuable asset; every decision is made with that in mind.

- We are committed to transparency.

- As we move forward designing and implementing SET, communications will be shared every step of the way.

- Be on the lookout for emails, SET website updates, FAQs, forums, and more.

- We want to hear your thoughts. Provide feedback on the Knight Vision website.

There is a lot we do not know yet. **Please be patient** as we continue moving forward with details and decisions that will help to answer key questions.

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# Questions and Answers

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# Acknowledgement

**We recognize the issues of the past and the lack of trust in these kinds of initiatives:**

- Trevor Colbourn Hall
- Unfunded and unfinished classification and compensation changes
- IT centralization project

**The SET team is working to avoid these issues**
- Lessons learned from the IT centralization project
- Connecting with colleagues and other institutions to gather lessons learned and advice
- Engaging a campus Advisory Committee to help with decision making
- Leveraging experts to support the implementation and change management

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# Stay Informed and Get Involved

Keep up to date by visiting the
Knight Vision website at **knightvision.it.ucf.edu**

Email: knightvision@ucf.edu

Subscribe to our monthly newsletter:
**knightvision.it.ucf.edu/get-involved**

Provide feedback:
**https://tinyurl.com/KnightVisionFeedback**

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