TRANSITION TEAM CHARTER

Please use this charter to guide your selection of Transition Team members for your college or division.

Purpose and Process

The process of filling positions for the new HR and finance operating model outlined by the Service Enhancement Transformation (SET) project will have a variety of impacts on departments and units that need to be appropriately managed by each college and division.

Transition Teams will be formed to assist colleges and divisions with identifying the impacts of the new operating model and identifying potential solutions for reorganizing responsibilities. Their focus will be on two primary impacts:

- Accounting for departmental responsibilities that may be left behind by staff who are taking new SET positions;
- Accounting for the newly created capacity of staff remaining in departments, whose current HR and finance responsibilities will be fulfilled by the new SET HR and finance teams.

Managing these impacts will require a local reorganization of work, with creative and thoughtful solutions. Transition Team members will serve as local contacts for staff and supervisors; they will answer questions, encourage staff to express interest in positions, help devise solutions, manage impacts and walk people through the transition during the first half of 2022.

Roles and Responsibilities

Transition team members will:

1. Leverage the tools, templates and approach outlined by the SET project team to ensure all transition teams are coordinated across the institution.
2. Connect with staff to talk about SET, answer questions and encourage them to express interest in roles.
3. Document current staff responsibilities and talk about the potential impacts of SET related to their HR and financial responsibilities.
4. Discuss staff interest in taking new roles within SET or remaining in the department, and make recommendations to relevant supervisors.
5. Track responsibilities as staff are identified and selected for SET-related roles and help transition their non-SET responsibilities to the staff who remain in the departments.
6. Meet with supervisors to help them think through the transition of responsibilities and staff.
7. Document transition plans that help ensure non-SET responsibilities are outlined and accounted for, both for individuals and the larger college, division, department or unit.
8. Present recommendations for the reorganization of responsibilities to college or division leadership.
9. Establish communication channels so all impacted staff are aware of responsibility changes throughout the transition.
10. Facilitate the creation of staff Individual Transition Plans (ITP), update job descriptions and connect with supervisors about the changes.

Transition team members will not:

1. Make the final decisions about people's responsibilities or the reorganization of departments/units. However, they are expected to present solutions and recommend reorganizations of responsibilities for sign-off by the appropriate college dean or division leader.
2. Make hiring decisions for SET college/division business center teams. However, Transition Teams will encourage staff to express their interests and can make recommendations for placement.

Team Selection

Deans and division leaders will identify representatives to participate as Transition Team members for their college or division. Transition Team members should be selected based on their understanding of the college's or division's operations, ability to remain neutral, history of creative problem solving, excellent people skills and ability to help build consensus. Team members will be supported by and collaborate with the SET Workforce Transition Work Team to ensure the timely transition of their college/division.

Team Size and Make-up

Each Transition Team should be adequately sized — large enough to share workload and small enough to reach decisions by consensus. Consider the following in selecting your team:

- Chose 5 to 6 members.
- Designate one person as the chair of the Transition Team.
- Include your designated finance/budget director.
- Include someone from your communications team.

Team Management and Coordination

The Associate Vice President and Chief HR Officer, Maureen Binder, has asked Assistant Vice Provost Chuck Reilly to help lead and coordinate the Transition Teams with the support of the SET project team and the following members of the Workforce Transition Work Team:

- Michelle Brooks – Director, Employee Relations – Human Resources
- Seresa Cruz – Director, Human Resources and Budget – College of Science
- Margie Chusmir – Organization Development Consultant – Human Resources
- Joshua Hallam – Compensation and Classification Analyst – Human Resources
- Keana Galloway – EEO & Search Compliance Manager – Office of Institutional Equity

Timeline and Effort Estimation

For consideration in the selection and identification of Transition Team members, please review the timeline and estimated monthly time requirements for team members. We anticipate time commitments include meetings with the team and meetings with impacted staff. Please refer to the Workforce Transition Plan for an overview of the SET transition.

The hours listed below are per month but will vary based on the number of Transition Team members selected and administrative staff in your college or division.

- **December (~ 12 hours)**
  - Deans and division leaders select Transition Team members identified for each area.
  - Team members attend an introductory training session.
  - Team members introduced to responsibilities and associated transition plan tools and resources.
  - Team members establish meeting schedule and pace.
    - Every other week 2-hour meetings starting in January (excluding holidays).
- **January to March (~ 20 hours)**
  - Teams begin meeting with impacted staff, documenting interests and current responsibilities. Lists and information will be provided to each team.
  - Team members begin drafting potential Transition Plans.
  - Team members identify and document early impact concerns.
- **April (~ 25 hours)**
  - Teams continue meeting with impacted staff and supervisors, completing Individual Transition Plan (ITP) drafts for impacted staff.
  - Teams conclude meeting with staff selected for SET positions to document other responsibilities to be accounted for.
  - Teams combine ITPs for impact analysis on colleges, divisions, departments and units.
- **May (~ 25 hours)**
  - Teams outline potential solutions for transitioning responsibilities to staff remaining in departments and units.
  - Teams continue meeting with impacted staff and supervisors completing ITPs.
  - Teams meet with college/division leadership to outline the global impacts and present recommendations.
- **June (~ 25 hours)**
  - Teams finalize recommendations with senior leadership.
  - Teams meet with staff and supervisors to finalize any remaining ITPs.
  - Teams begin monitoring ITP implementation and help ensure transitions are completed prior to June 24th.
- **July (~ 25 hours)**
  - Teams follow up with any outliers or uncompleted ITPs.
  - Teams meet with staff and supervisors in departments to review new responsibilities and address any concerns.

Questions

If you have questions about Transition Teams or the overall SET project, please feel free to send them to:

Colleges/Academic Units: Chuck Reilly, Assistant Vice Provost — Charles.reilly@ucf.edu
Administrative Divisions: Maureen Binder, Chief HR Officer — Maureen.Binder@ucf.edu