

WORKFORCE TRANSITION PLAN

The following principles will guide our approach for how we will transition together as an organization:

1. Retain our staff throughout the implementation of SET.
2. Fill roles with as many qualified internal staff as possible.
3. Make every effort to place people in the roles and college/division of their choice.
4. Make the process of expressing interest simple and easy.
5. Strive to select staff for roles that align with their background and/or interest.
6. Identify the candidates to fill leadership roles as quickly as possible.
7. Provide new opportunities for interested staff who meet the qualifications.
8. Ensure every potentially impacted staff member has a local contact who will connect with them and help outline their individual transition plan.
9. Provide comprehensive support and training for the SET positions.
10. Share defined pathways for career growth and advancement.
11. Ensure colleges and divisions are involved in the process and coordinate changes across the institution.

1. Retain our staff throughout the implementation of SET.

SET will align resources for new processes; SET is not designed to reduce staff. Throughout the implementation of SET, we want to retain our talent and help staff feel heard and valued. We also ask that staff members remain patient in the transition.

The Activity Study administered to staff in March 2021 indicated that just over 1,000 people partake in HR, payroll, finance, procurement and unit-based post-award activity across our university. The creation of Transition Teams will ensure impacted staff members have a local point of contact to walk them through the transition during the first half of 2022.

- Transition Team members, staff from every college and division, will be identified by college deans and division leaders in December 2021.
- Transition Teams will meet with staff starting in January 2022 to discuss their interests and current responsibilities.
- Transition Teams will help encourage staff to consider potential SET roles based on their qualifications and interests.

2. Fill roles with as many qualified internal staff as possible.

The SET model will improve HR, payroll, finance, procurement and post-award services and processes throughout our university. This model's benefits to our people include:

1. Creating defined, uniform roles, responsibilities and competencies for staff and supervisors.
2. Providing staff with more effective training opportunities, boosting their ability to develop specialized skills and clearly defined pathways for advancement. (Note: there will be time dedicated specifically to provide training for employees.)
3. Providing service coverage so staff have specialist backup in their absence.
4. Reducing duplicative work by simplifying and standardizing processes, yielding an improved work environment that benefits from central offices support.

To ensure our staff are successful in their new roles, we will request that interested staff be qualified for the positions outlined in the model and support them with robust training. In addition, multiple job profile levels and associated qualifications exist for each position, which allow for a broad range of experience and provide current staff with the maximum opportunity to find a role that is the best fit for them.

We will utilize the following criteria when filling the roles:

- Staff must be qualified for the position to be considered.
- Most positions will have multiple levels to help accommodate different experience levels of current staff and match the responsibilities for that role.
- Positions that require a degree will allow for a year-for-year substitution of experience.
- External hires will only be considered for roles where no qualified internal staff are available.
- Staff will need to provide documentation of experience and qualifications.
- Relevant experience will be evaluated by HR.

3. Make every effort to place people in the roles and college/division of their choice.

We feel it is important that every staff member has an opportunity to express interest in the roles that fit their interests and desires. We cannot promise that every decision will match every employee's expressed interest, but we will factor that interest into the decision-making process.

We will utilize the following criteria to support this effort:

- Staff will have an opportunity to express interest in both the role and college, division or central unit of their choice.
- All available roles, staffing numbers and alignment with college, division or central unit will be clearly outlined and communicated.
- Job descriptions will exist for all available roles.

4. Make the process of expressing interest simple and easy.

Our employees have put a lot of effort, passion and excellence into supporting this institution and our mission. We will reduce barriers in the process of expressing interest and qualifications through the following approach:

- A survey will capture employees' ranked interest and qualifications.
- Transition Teams will meet with staff to discuss their interest and backgrounds.

5. Strive to select staff for roles that align with their background.

Many employees already perform HR, payroll, finance, procurement or unit-based post-award activities. If a staff member's interests align with a role that matches their current responsibilities, they will be given preference in selection.

6. Identify leadership roles as quickly as possible.

Staff expressing interest in a role will likely want to know who their potential supervisor will be. Where feasible, supervisor roles will be identified first.

We will take the following approach:

- Identify key leadership roles prior to the staff expression of interest process, where possible.

- Business center directors who are part of dual reporting relationships will be selected by the college dean or division leader and the relevant HR or finance leader.

7. Provide new opportunities for interested staff who meet the qualifications.

With the Knight Vision program, we are undergoing a transformation to improve our services and processes throughout our university. We want to empower our people to own their future and identify the opportunities that provide them with the best pathways for career growth and advancement. We will encourage this empowerment for our people through utilizing the following criteria:

- Previous experience will be considered in the selection of staff for SET positions.
- Staff will be considered for all available positions related to SET providing they qualify.

8. Ensure every potentially impacted staff member has a local contact who will connect with them and help outline their individual transition plan.

A key attribute of the Transition Teams is ensuring every potentially impacted staff member has a local contact. We will ask college and division leaders to select Transition Team members who are familiar with the staff and their responsibilities. Transition Teams will be provided with training, tools, resources and answers to questions employees may pose. These teams will be equipped to support staff in their expression of interest with up-to-date and accurate information about the project and the roles and responsibilities related to SET. In addition, these teams will be responsible for reorganizing the remaining responsibilities not outlined in SET for the departments and units.

In this process, Transition Teams will create an Individual Transition Plan (ITP) for each impacted employee detailing any changes in responsibilities or position expectations. Each ITP will also include an updated position description and any additional training required for the position.

- Transition Teams will meet with employees on multiple occasions starting in January 2022 to:
 - Assess their current responsibilities and identify potential impacts of SET.
 - Answer questions about SET related roles.
 - Assess and document the employee's interests.
 - Discuss potential role and responsibility changes.
 - Enable continuity for the needs of the department or unit.
 - Facilitate the creation of the employee's Individual Transition Plan (ITP).

9. Provide comprehensive support and training for the SET positions.

We will work to ensure staff are prepared for the future; we will provide staff with effective training, boosting their ability to develop specialized skills to succeed in their new roles.

We will provide comprehensive support and training through the following approach:

- The SET positions will have an extensive training plan developed inclusive of policy, process and technology (Workday).
- Staff who choose a new SET position will be given an Individual Training Plan by their supervisor that outlines trainings they will need to attend starting in May 2022.
 - Tools will be developed to track attendance and support registration and scheduling.
 - Multiple training modalities will be offered (computer, classroom, job aids, etc.).
- Transition Teams will help staff who remain in the departments and have new responsibilities, including by outlining a training plan and connecting staff with contacts to support learning and on-the-job questions.

- Where possible, staff who currently hold those responsibilities should help mentor and train staff remaining in the department before and after their own transition to a SET position.

10. Share defined pathways for career growth and advancement.

One advantage of SET is the focus it facilitates in the professional areas of either finance or HR. Effective training and clearly defined pathways for advancement will provide an opportunity to build a career, as well as a career path for roles ranging from entry level to highly experienced.

We will support these pathways for advancement through the following:

- SET will leverage job profiles with multiple levels of increasing responsibilities and complexity to allow growth within the same role.
- UCF leaders will be encouraged to train staff for higher levels of responsibility, rotate responsibilities and promote staff across colleges and divisions.
- Supervisors within the SET model will identify opportunities for professional certifications, conferences and other opportunities for growth and development.
- Central offices will play a significant role in continuous and ongoing training and development.

11. Ensure colleges and divisions are involved in the process and coordinate changes across the institution.

It is important to the institution for us to ensure the colleges and divisions are an integral part of these changes. This is also why the SET model unifies distributed HR and finance activity at the college and division level, requiring sponsorship from our college and division leaders to ensure success. In addition, this is an institutional transformation sponsored by our executive leaders and should be coordinated as such.

We will involve colleges and divisions through the following approach:

- Every college and division will select members for their Transition Team by December 2021.
- Transition Teams will be given a charge and detailed list of responsibilities.
- Transition Teams will be provided all the support and tools they need to execute on their responsibilities.
- Transition Teams will be consistent in their approach and application of tools.
- Every college and division will operate within the established finance and HR operating model.
- College and division leaders will work with the HR and finance central offices in the identification and selection of individuals for roles.