

A photograph of a large, dark-colored statue of a knight on a horse, set against a sunset sky with orange and blue tones. Palm trees and stadium lights are visible in the background.

Service Enhancement Transformation (SET)

BUSINESS CASE



What is the Service Enhancement Transformation (SET) Project?

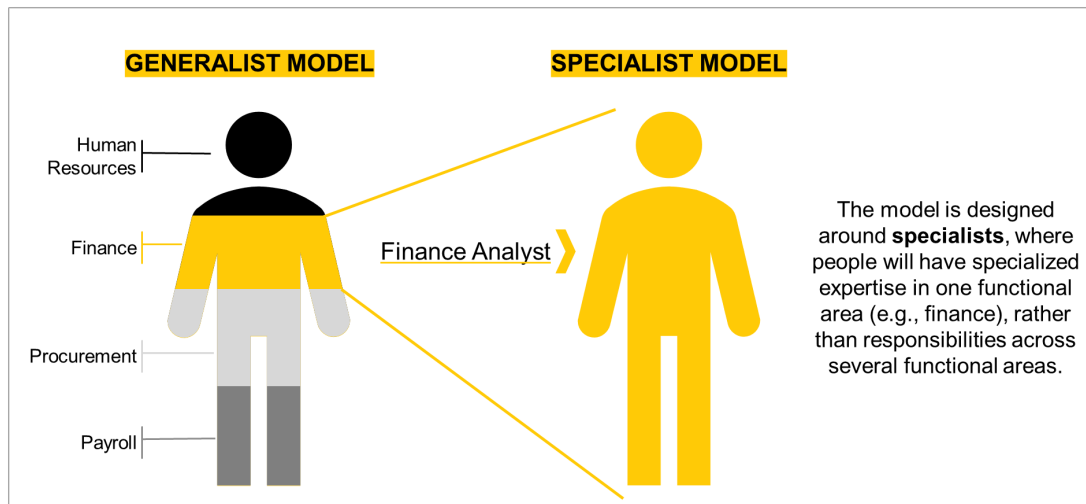
The Service Enhancement Transformation (SET) Project is part of the Knight Vision Program. It will improve and simplify **HR, payroll, finance, procurement and unit-based post-award** services and processes throughout our university. The goal, as stated by President Cartwright, is to improve the administrative structure that drives our operational excellence and efficacy. In doing so, we will provide better services for all users through the actions listed below.

Benefits to our People	Benefits to our University
<ol style="list-style-type: none"> 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. <ul style="list-style-type: none"> ➢ 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. 	<ol style="list-style-type: none"> 5. Increasing service speed, quality, and consistency. 6. Reducing risk from non-compliant processes and practices. 7. Using modern, state-of-the-art technology to improve upon outdated processes, providing uniform, high-quality customer experience. 8. Aligning with Workday to simplify processes, reducing approvals and oversight.

SET will align resources for new processes; SET is not designed to reduce staff.

Where are we coming from?

Our university experienced unprecedented growth, earning a spot in the national landscape of Tier 1 research universities. But we focused our growth on our student population and research capabilities, without providing sufficient resources for a sustainable infrastructure. The result of that oversight is aging technologies, redundant processes, misaligned organizational structures and duplicative roles. Our current model suffers from increased compliance risk and broad inefficiency across the university.



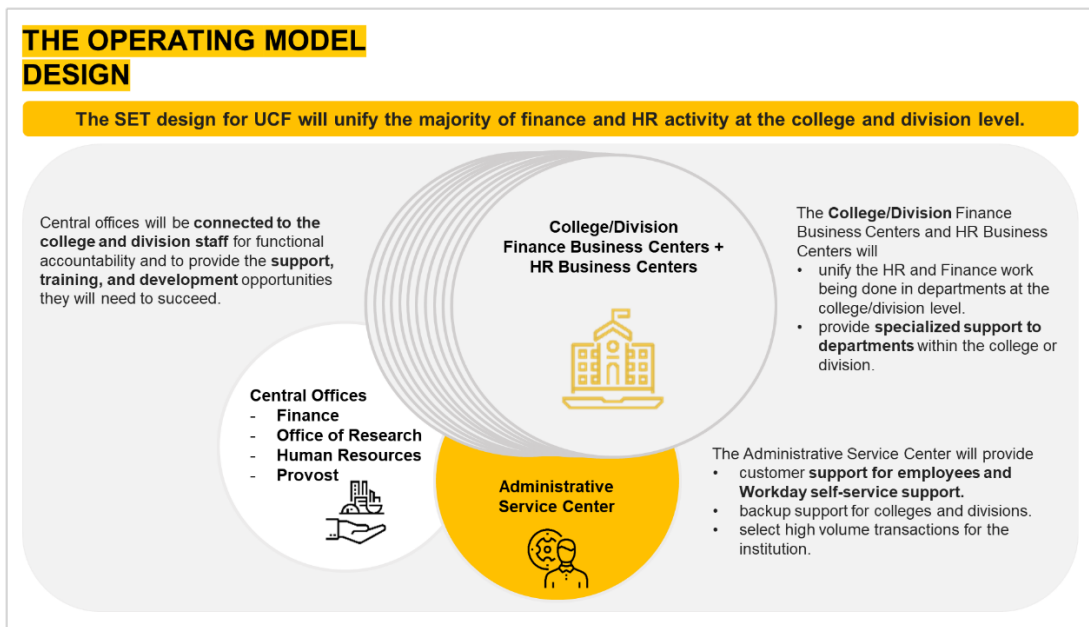
Today, our administrative processes and services are performed by our staff, who are frequently “generalists.” With generalist roles, an individual’s responsibility can be split between many different functional areas. This frequent splitting between functional work areas prevents our staff from developing deep expertise in any one area, impacting mission-critical work and inhibiting them from developing more profound expertise in a focused area.



The Activity Study administered to UCF staff in March 2021 identified that more than 75% of our HR, payroll, finance and procurement work is distributed across campus through generalists, and most of the effort is highly fractional. For example, 85% of procurement effort constitutes less than 25% of any individual's focus. Continuing to function in this way would result in more of the same issues of duplicity and inefficiency for our institution. Without addressing the underlying challenges of our existing business infrastructure, the benefits of the new Workday technology will not be fully realized. Our goal is to embrace the attributes of effective organizations: strategy-led, people-driven and technology-enabled.

What will SET look like?

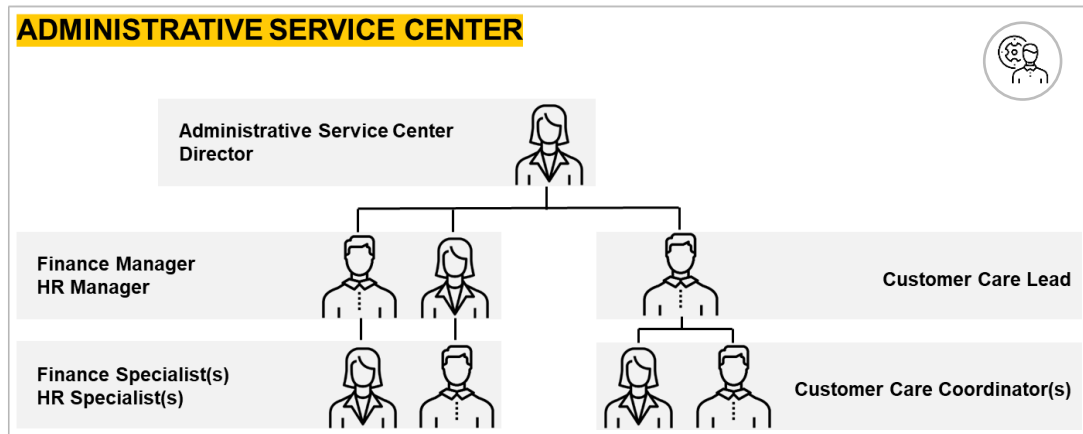
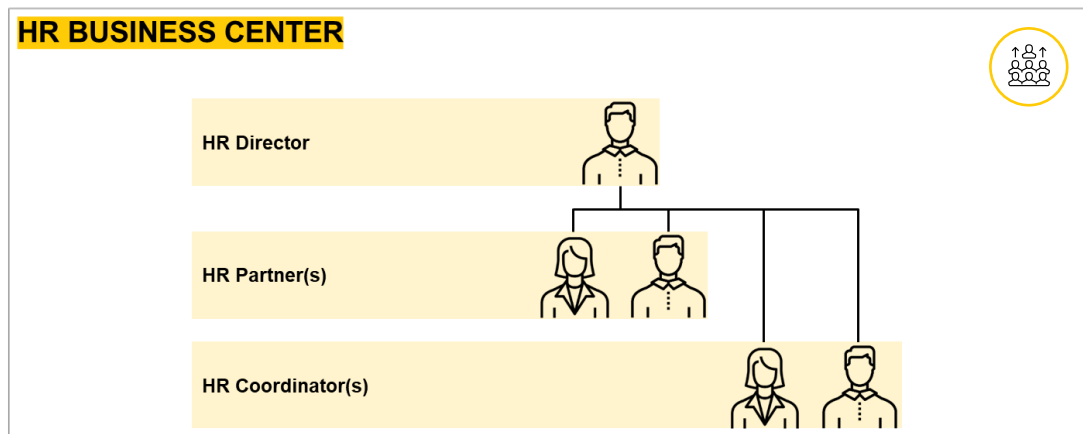
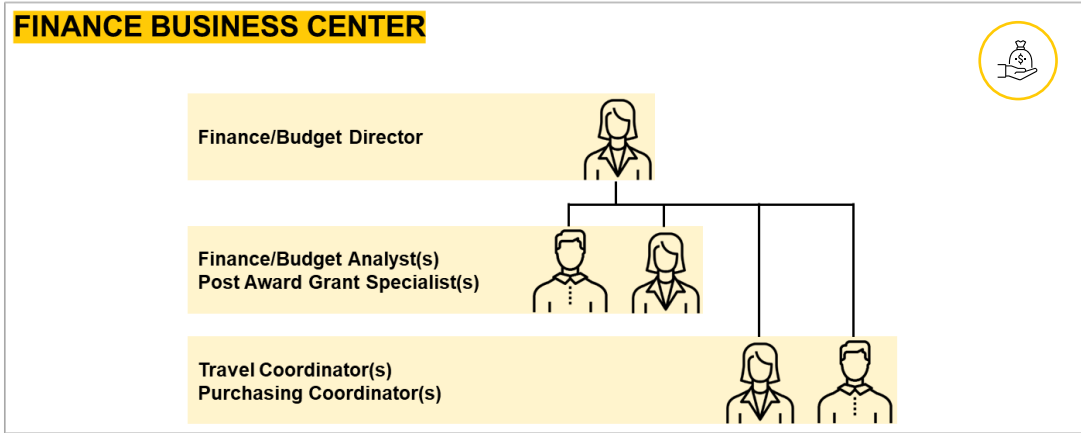
The SET model will reimagine our processes, technology and organizational structure to provide better services across the HR, payroll, finance, procurement and unit-based post-award functions through the following design:



- **Central Offices** will have a new relationship with, and connection to, the college/division business centers:
 - Our Central Offices will operate as centers of expertise and provide the college and division business centers with dedicated training, development and support.
 - Our directors of each college or division business center will report to **both their dean or division leader and the appropriate central office.**
 - Within central HR, we will establish a Talent Acquisition team for our staff and temporary positions to provide best practices in recruiting, hiring and retaining talent, as well as improved hiring times for departments.
- The **Administrative Service Center** will be a single source for answering common questions and inquiries from employees, support for self-service capabilities in Workday and back-up for the college and division business centers.
- **College/Division Finance Business Centers** will be established to support our colleges and divisions with finance, procurement and grant related services; each college and division will have a dedicated Finance Business Center.

- **College/Division HR Business Centers** will be established to support our colleges and divisions with HR related services; there will be multiple shared HR Business Centers for colleges and divisions.

There will be multiple Finance Business Centers and HR Business Centers to support specific colleges and divisions.¹





¹ The following graphic is an illustrative organizational model; these are roles, not final positions, titles or staffing numbers.





What are the roles and responsibilities of the Finance Business Center?

Outlined below are the potential roles and responsibilities for the Finance Business Center.²

Professional Support 	Administrative Support 
Finance/Budget Director <ul style="list-style-type: none"> • Prepare college or division budgets (Executive Partnership) • Determine strategic financial direction and decision making • Prepare financial plans and forecasts • Develop recommendations for increasing revenue and/or decreasing expenses • Manage positions and allocate funding 	Travel Coordinator(s) <ul style="list-style-type: none"> • Prepare travel advances and travel expense reports • Arrange and book travel • Collect receipts and review expense reports for policy adherence
Finance/Budget Analyst(s) <ul style="list-style-type: none"> • Develop load budgets into Adaptive • Manage cost centers • Prepare financial reports and associated analysis • Reconcile accounts to ensure accuracy of transactions • Audit expenses, journal entries, and invoice payments • Manage contracts for the college/division 	Procurement Coordinator(s) <ul style="list-style-type: none"> • Initiate requisitions for purchases • Add and/or validate worktags (accounts) • Perform receiving in Workday to ensure timely payment to supplier • Return items to suppliers, if necessary • Resolve supplier invoice issues and discrepancies • Make P-Card purchases for department needs • Verify, review, and reconcile P-Card purchases • Manage assets and track inventory
Post-Award Grant Specialist(s) <ul style="list-style-type: none"> • Serve as contact for PI (Principal Investigator) on grant budget, expenditures, and applicability • Act as financial manager and approver for PI, grant awards, and sub-awards • Perform budget modifications (No Cost Extension or NCE) • Determine cost share commitments • Perform buy out requests • Provide expense reports • Initiate close-out process • Review and approve grant related position funding allocations 	


What are the roles and responsibilities of the HR Business Center?

Outlined below are the potential roles and responsibilities for the HR Business Center.³

Professional Support 	Administrative Support 
HR Director <ul style="list-style-type: none"> • Workforce, culture, DE&I (Diversity, Equity & Inclusion) Strategy • HR policy and compliance • Annual workforce and succession planning • HR strategic planning and initiatives • Organizational design, role and responsibility alignment • Policy and compliance education 	HR Coordinator(s) Faculty/Staff <ul style="list-style-type: none"> • Process employee job changes in Workday (hire, transfer, promotion, renewal, compensation change, one-time payments, etc.) • Local onboarding and offboarding • Timekeeping and time audits • Annual performance management tracking and compliance


² Additional detailed job descriptions and service matrices will be developed to clarify the roles and services expected to be performed; position responsibilities may be combined based on the needs of the area supported.

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Professional Support 

HR Partner(s)

- Objective setting, performance and development planning
- Policy and compliance education
- Position development and creation
- Manage and track appointment types
- Position classification
- Compensation analysis
- Discipline and grievance management
- Employee relations
- Compensation negotiations and offer/employment agreement preparation
- Advise on personnel changes
- Initiate and approve personnel changes


Administrative Support 

HR Coordinator(s) Student, GA, Post Doc, etc.


- Initiate and approve personnel changes
- Process employee job changes in Workday (hire, transfer, promotion, renewal, compensation change, one-time payments, etc.)
- Local onboarding and offboarding
- Timekeeping and time audits
- Manage (non-payroll) affiliations
- Support search committee coordination

What services are provided by the Administrative Service Center?

The SET model also consists of an Administrative Service Center. With most of our transactional and professional HR and finance services being unified at the college and division level, this will be a smaller unit that will provide high-volume, low-dollar transactions, as well as customer support for our entire university. The Administrative Service Center will provide additional transactional support for the President’s Division and Administration and Finance.






HR, Finance, Procurement and Travel Specialists 

- Provide backup support to college and division business centers
- Operate as campus experts on processes and procedures
- Support training and development
- Provide specialized reporting and analytics
- Support central office transactions
- Continuously improve processes and workflows

Customer Service Coordinators 

- Answer employee-based questions and requests
- Route and escalate requests to appropriate providers
- Provide Workday self-service guidance
- Support policy and procedure questions
- Provide transaction progress updates
- Track service level metrics

What are the benefits of the new operating model?

 People	 Organizational Structure	 Business Process	 Technology	 Performance Measurement
Empowered staff with structured training to develop functional expertise guided by a model that creates career path and growth opportunities	Clear and consistent roles, competencies, and administrative structures	Improved operational efficiency and support for faculty/staff with a focus on customer service and collaboration	Single source of truth; better analytics with regular updates to enhance functionality and modern user interfaces	Accountability with KPIs designed to transparently monitor service quality