A Time of Transition

CCIE Faculty & Staff Meeting

Interim Dean Glenn Lambie

01.21.2022
Agenda

1. Welcome
2. CCIE Leadership Searches
3. UCF New Budget Model
4. UCF Service Enhancement Transition (SET) Project
5. Questions – enter in Chat or submit via the online form: ccie.ucf.edu/qa-sessions/; will be answered in upcoming meetings
CCIE Leadership Searches
CCIE Dean Search

Search Committee Members:

➢ Dean, Mary Lou Sole; *College of Nursing* (Co-Chair)
➢ Dean, Sheila Amin Gutiérrez de Piñeres; *Burnett Honors College* (Co-Chair)
➢ Su-I Hou, *School of Global Health Management & Informatics*
➢ Allison Jefferson, *Dean’s Office*
➢ Florencio “Eloy” Hernandez, *Dean’s Office*
➢ Ross Wolf, *UCF Downtown*
➢ Staci Zavaturo, *School of Public Administration*
➢ Atsusie Hirumi, *Department of Learning Sciences & Educational Research*
➢ Eric Merriam, *Department of Legal Studies*
➢ Sejal Mehta Barden, *Department of Counselor Education & School Psychology*
➢ Thomas Vitale, *Department of Educational Leadership and Higher Education*
➢ Sarah Bush, *School of Teacher Education*
➢ Chinyere Anunobi, *CCIE Representative in Student Senate*
➢ Reverend Robert M. Spooney, *Pastor, Mt. Zion Missionary Baptist Church, and CEO, R M Spooney & Associates*
➢ Maria Vazquez, *Deputy Superintendent, Orange County Public Schools*
Search Committee Members:

- Tim Ravich, *Interim Chair, Department of Legal Studies* (Chair)
- Lee Ross, *Professor*
- William Moreto, *Associate Professor*
- Stephen Holmes, *Associate Professor*
- Bethany Backes, *Assistant Professor*
- Kristina Childs Fisher, *Associate Professor*
- Gail Humiston, *Associate Lecturer*
- Elexis Ritz, *Academic Program Coordinator II*
Director, School of Teacher Education Search

Search Committee Members:

➢ RoSusan Bartee, Chair, Department of Educational Leadership & Higher Education (Chair)
➢ Matthew Marino, Professor
➢ Farshid Safi, Associate Professor
➢ Su Gao, Assistant Professor
➢ Judy Levin, Senior Lecturer
➢ Norine Blanch, Associate Lecturer
➢ Anjelle Allen, Academic Program Coordinator I
Chair, Department of Legal Studies

✓ Tim Ravich – serving as Interim Chair for 2021-2023
✓ Search for Chair – Fall 2022
✓ New Chair begins Fall 2023
Responsibility Center Management (RCM)

- **Current Budget Model** – Hybrid Incremental Budgeting (*rolling budgets forward from one year to the next; adding or subtracting a small percent*) and Performance Funding to reward mission delivery

- **New Budget Model** – Incentive Based Budgeting (decentralized budget allocation and management that assigns greater control over resource decisions to local units; Colleges)

- Colleges as revenue generating units
  - Net Tuition and Fees
  - State Appropriation
  - Contracts & Grants
  - Indirect (F&A) Cost Recovery
  - Auxiliary
New Budget Model

❖ **Current Budget Practices** – Tuition and state appropriations are received centrally and then allocated to academic & administrative units as spending authority through a mostly incremental budgeting process.

❖ **New Budget Practices**
  ▪ Undergraduate, graduate, and online tuition will be allocated to Colleges based on share of student credit hours (SCHs)
    • **80%** to College based on instructional SCHs (College of Instructor)
    • **20%** to College based on enrolled SCHs (College of Record)
  ▪ State Appropriations will be divided into three pools of allocation to the Colleges in alignment with both the University’s core strategic functions and the state metrics utilized for allocations
    • **42.5%** for instructions based on number of SCHs instructed
    • **42.5%** as an incentive for student completion based upon degree completion
    • **15%** as an incentive for research based on a 3-year average of total grants & contracts revenue
New Budget Model – Expenses

- **Direct Expenses**: Salary & Benefits, Supplies & Services, Telephones, Travel, Repairs & Maintenance, Furniture & Equipment, etc.

- **Administrative Costs**: Contribution from revenue generating units (Colleges) for Central Support Units to operate (*Colleges’ Pay Fee / Taxes for Central Support Units*).

<table>
<thead>
<tr>
<th>Central Support Units</th>
<th>Central Support Units</th>
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<tbody>
<tr>
<td>Academic Affairs <em>(faculty headcount)</em></td>
<td>University Financing</td>
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<tr>
<td>Academic Support <em>(total student FTE)</em></td>
<td>Compliance</td>
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<td>Administration</td>
<td>Communications &amp; Marketing</td>
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<td>Facilities <em>(square footage)</em></td>
<td>University Development</td>
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<td>Public Safety</td>
<td>Human Resources</td>
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<td>President &amp; Government Relations</td>
<td>Information Technology &amp; Resources</td>
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<td>Finance</td>
<td>Office of Research <em>(Grants &amp; Contracts Distribution)</em></td>
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<td>Student Development &amp; Enrollment Services</td>
<td>University Libraries</td>
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New Budget Model – Central Funding & Subvention

- **Central Funding & Subvention**: Pool of resources utilized by the President & Provost to strategically invest and allocate resources to address unit-level subsidies, university priorities, revenue growth strategies, and other strategic initiatives

  - Participation Fee Collected From Colleges to Develop Central Pool
    - 18% of selected unrestricted revenue (excludes C&G, indirect, materials, supplies and equipment fees, transfer)
  - Subvention Pool
    - Allocation to Units to offset mission-critical units with high operating cost (e.g., College of Business, College of Engineering & Computer Science, College of Medicine)
New Budget Model – Implications for CCIE

1. All CCIE faculty & staff members need to understand different types of funds (all funds belong to UCF)

✓ Educational & General Funds (E&G) – funds received by the university directly from the legislature (state appropriation) and from student tuition

✓ Contracts & Grant Funds (C&G) – funds received from contracts, grants, and other research-related funds provided by governments or private entities (sponsored projects)

✓ Foundation Funds – universities & colleges’ foundations are public charities that receive funds as gifts & donations

✓ Auxiliary Funds – funds where individuals &/or units generate their own revenue (e.g., conferences, professional development, etc.).
New Budget Model – Implications for CCIE

2. Develop strategic enrollment plan for college, departments/schools, and degree programs

✓ UCF is not in enrollment growth model at the undergraduate level
✓ Need to have purposeful plan to increase enrollment in under prescribed degree programs and decrease enrollment in overprescribed degree programs
  ▪ Work with academic unit leaders to develop enrollment plans based on data
✓ Reallocate resources based on data
  ▪ When faculty &/or staff members leave UCF, the reallocation of the position will be based on current unit needs as compared to historical practices
✓ Invest resources to support sound enrollment strategy
  ▪ Invest resources to promote visibility & ranking of strong degree programs
New Budget Model – Implications for CCIE

3. Review the current “Fiscal Health” of each departments/schools and degree programs

✓ Will be meeting with academic unit leaders to review current fiscal health of the unit based on new budget model indices
✓ Academic unit leaders will meet with faculty & staff members to review the fiscal health of the unit based on new budget model indices
✓ Academic units will develop a strategy to maintain or increase the fiscal health of the unit
New Budget Model – Implications for CCIE

4. Develop strategy for contracts & grants within the New Budget Model research fees/taxes

✓ Based on new budget model, colleges may have to pay as much as 41% of total C&G funds awarded – e.g., $1,000,000 grants award would equate to a $410,000 fee to be paid to the Office of Research

✓ Need to increase our C&G funding with full-indirect cost (51%)

✓ Need to establish strategy to ensure the CCIE research portfolio does not include too many C&G projects with limited indirect cost
  • Indirect cost
  • Salary savings
  • Generating Student Credit Hours (SCH)
Service Enhancement Transformation (SET) Project

UCF Initiative

• Part of the Knight Vision Program to improve and simplify Human Resources (HR), payroll, finance, procurement and unit-based post-award services and processes throughout UCF.
• Per President Cartwright, our goal is to improve administrative structure that drives our operational excellence and efficacy.
• Will align resources for new processes; not designed to reduce staff.
Service Enhancement Transformation (SET) Project

Rationale for SET project:
• Transition from “generalists” to “specialists” model
• Staff Activity Study 75%+ of HR, payroll, finance and procurement work distributed across campus through generalists; highly fractional efforts
• Impacts mission-critical work and inhibits staff from developing more profound expertise in a focused area
• Continuing current model results in same issues for UCF
• Benefits of Workday would not be fully realized without addressing underlying challenges of existing business infrastructure
• **Goal:** embrace attributes of effective organizations – strategy-led, people-driven, and technology-enabled
CCIE SET Transition Team

Academic Unit Staff
Eric Brewington
Administrative Coordinator III
School of Teacher Education

Finance
Jim Clarke
Budget Director I
CCIE Budget Office

Faculty
Shannon Elswick
Associate Instructor
School of Global Health and Informatics

Academic Unit Leader
Doug Goodman
Professor & Director
School of Public Administration

Deans Team
Allison Jefferson
Assistant Dean
CCIE Dean’s Office

HR College
Vanessa Nixon
HR Business Unit Manager
CCIE Dean’s Office
SET – Workforce Transition Guiding Principles

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

✓ In CCIE, 47 staff members will be directly affected
✓ These 47 staff members will receive university-administered interest survey the week of January 24, 2022
✓ Transition Team members completed the following two university workshops:
   1. Roles and Responsibilities
   2. Change Management and Leadership
✓ The Transition Team will:
   ✓ conduct individual meetings with the 47 staff members and their supervisors beginning late early February 2022
   ✓ serve as point of contact for the 47 affected staff members
   ✓ focus on identifying responsibilities that are outside of SET to ensure units are appropriately staffed after business centers are established
   ✓ clarify university-wide communication with college specific information
SET Structure in CCIE

Dual Reporting for Finance Director & HR Director

**Deans**
- Determine the strategic direction of the College
- Set goals & expectations for center within the College
- Involve Directors in leadership & strategy initiatives

**Director**
- Execute the decisions of the Dean within guidelines, policies, & procedures
- Consistent use of direct staff reports

**Central Offices**
- Set institutional standards for the work, policies, and practices
- Involve in leadership meetings and collaborate on institutional strategy
- Provide functional training and development, coaching and mentorship
- Ensure consistency and competency across roles in how strategy is executed

**Shared Decision Making**
Employment decisions (e.g., hiring); Performance reviews & goals; Business center staffing; Modifications to position description; Navigating conflicting priorities; Career advancement opportunities; Disciplinary actions; and Supporting training program certification & conferences
CCIE SET – HR & Finance Business Centers
Based on transaction data and complexity of CCIE, includes providing services to centers, institutes, and grants
**SET Project Timeline**

### Staffing the Model
- Identify business center directors
- Post job descriptions
- Hold job fair
- Complete expression of interest survey
- Identify & select staff for SET roles
- Participate in Workday testing
- Attend training
- Officially start in new role

### Workforce Transition
- Identify Transition Team Members
- Hold kickoff training for Transition Teams
- Begin meetings with employees & supervisors
- Capture non-SET responsibilities from selected staff
- Draft Individual Transition Plans
- Confirm reorganization plans with college/division leadership
- Share Individual Transition Plans with staff and supervisors

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Go Live
I will be following–up at upcoming academic unit & staff meetings for Q&A sessions

Thank you for your support!