Staffing and Backfill Approach Framework

This framework represents the proposed approach to staffing the UCF internal ERP implementation project team and associated backfill considerations and includes four primary sections.

1. **Guiding Principles**: ideals that the ERP project team will aspire to in evaluating staffing considerations

2. **Staffing Approach**: description of hiring approaches that will be employed depending on level of effort committed to the project.

3. **Backfill Approach**: criteria to be considered in evaluating the need for backfill or roles vacated by ERP project team members.

4. **Administrative Considerations**: details related to compensation, reporting relationships, leave, and back office procedures.
The approach to staffing and backfill for ERP project team positions will vary depending on the percentage of overall effort dedicated to the project for each position.

<table>
<thead>
<tr>
<th>Category</th>
<th>FTE Commitment to ERP Project Team</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>0.50 FTE or Greater</td>
</tr>
<tr>
<td>External Search</td>
<td>–</td>
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<tr>
<td>Internal Search</td>
<td>✔</td>
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<tr>
<td>Appointment</td>
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<tr>
<td>Backfill for Vacated Position</td>
<td>✔</td>
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<tr>
<td>Additional Compensation</td>
<td>✔</td>
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<tr>
<td>Reporting Relationship</td>
<td>ERP/Home Unit</td>
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</tbody>
</table>

**Notes:**

- Efforts will be made to align interested individuals with ERP project team roles and to ensure that the core operations of units committing resources to the ERP project team are not negatively impacted.
- Dedicated resources within UCF HR will be assigned to manage ERP project team hiring activities to ensure consistency and expediency.
- A committee will be formed to review and approve or deny requests for additional compensation for individuals assigned to dedicate 25% or more of their effort to support the ERP project team.
- All project resources will be funded using project budget in accordance with their attendant commitment of FTE effort to the ERP project.
- Units may fund backfill requirements using residual unit-level budget which will become available as compensation for project resources is absorbed completely or in part by the ERP project budget.
- Efforts will be made to ensure that commitment to the ERP project team does not result in interruption of planned annual leave benefits.
- All Human Resources activity required to effectuate staffing of the ERP project team, and backfill vacated responsibilities will be subject to standard UCF Human Resources policies, processes, and procedures unless otherwise noted.
UCF INTERNAL ERP PROJECT TEAM
STAFFING AND BACKFILL APPROACH FRAMEWORK

Overview
This document provides a high-level framework for the proposed approach to staffing the UCF internal ERP implementation project team and associated backfill considerations. This document is intended to serve as a guide and is an additional support to, rather than a replacement of, any existing university policy related to hiring. This document is subject to change over time as new considerations arise.

High-Level Staffing and Backfill Approach Framework

Guiding Principles
While not always possible to attain, the following ERP project team attributes are desirable
- Resource commitments to the ERP project team must be structured such that core central office and unit-level functions are not negatively impacted and are able to continue providing current levels of service to stakeholders
- Participation in the ERP project as a team member in any capacity is a career enhancement opportunity and should be articulated to potential candidates across the institution accordingly
- ERP project leadership reserves the right to request an Exemption from Posting waiver for project leadership positions, in coordination with home unit leadership, should such action be deemed necessary to ensure that key project team resources have the appropriate skillset and functional expertise
- To the extent possible, ERP project team roles will be filled by functional experts with deep institutional and functional knowledge to promote optimization of the system and associated processes in the future state
- The ERP project team will give preference to central office resources to staff project team roles, particularly those requiring deep subject matter expertise or extensive commitment of FTE effort
- If possible, it is advantageous to have one or more representatives of academic units (ideally at the college level) included as a member of the project team
  - Participation provides the ERP project team with a "local" lens and generates buy-in from academic units
  - Participation in the ERP project as a team member will require review and approval regardless of whether the position is subject to a competitive search (internal or external) or is an appointment by unit and project leadership
  - ERP project resource commitments are subject to change as resource demands shift over the life of the project
- Staffing and backfill activities will be performed as needed according to evolving project needs
  - All Human Resources activity required to effectuate staffing of the ERP project team, and backfill vacated responsibilities will be subject to standard UCF Human Resources policies, processes, and procedures unless otherwise noted herein
  - To ensure that the ERP project team is in place prior to anticipated initial project milestones, Human Resources processes required to support staffing and backfill will be expedited and will rely on timely, accurate inputs from client units
  - UCF HR will commit to expedited support for staffing and backfill activities falling under the purview of home units (e.g., drafting backfill position descriptions).

Staffing Approach
Hiring for project resources, whether internal or external, will adhere to UCF, state, and federal policy guidelines and UCF hiring practices
- Internal hiring practices will be based on projected effort committed to project
  - For resources committing 50% or greater FTE effort to the project, a competitive search will be required
    - Searches will be led by the UCF Human Resources Talent Acquisition team with input from appropriate functional leaders
    - Coordination with the Office of Institutional Equity (OIE) is required to ensure fair, equitable, and defensible hiring practices in each case
    - An Exemption from Posting waiver may be required to exempt key roles from competitive search requirements to ensure appropriate skillset and expertise for key project roles
  - For resources committing less than 50% FTE effort but greater than or equal to 25% FTE effort, a competitive search will not be required
    - Efforts will be made to align interest in the project by candidates with resources assignments
    - Special care must be taken to ensure that resources committing 25%-50% FTE effort to the project are supported in identifying work that can be delegated in order to avoid untenable expectations
  - For resources committing less than 25%, assignment to the project, a competitive search will not be required
    - Assignment of these roles may be based on the subject matter expertise, affinity, or availability of resources to a larger degree

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Assignment of these roles may vary in duration and may be required over the course of the entire project or may be required only during a specific time period(s)

- External hiring will be subject to standard hiring practices in all cases
  - Decisions to hire externally and associated hiring efforts should be undertaken as soon as possible to ensure resource availability
- The selection approach will differ depending on the position and attendant attributes
  - General composition recommendations
    - Diverse composition
    - Committee or panel to include at minimum three participants
    - Committee or panel to include at minimum one workstream lead and one BOC member
    - Committee or panel to include cross-functional selection of stakeholders
  - Search committee selection approach
    - Applications reviewed by committee
    - Committee interviews and narrows candidate pool to between three and five candidates
    - Hiring official only participates in final interview
    - Committee may be used for multiple searches
    - Committee is subject to open meeting laws requiring meeting notices and minutes
  - Hiring panel selection approach
    - Applications reviewed by hiring official
    - Panel participants take part in interviews and provide insights for the hiring official to consider
    - Hiring official participates in all interviews
    - New panel required for each search
    - Closed interview process
  - Appointment of project resources approach (requires Exemption from Posting waiver)
    - Hiring officials complete the “Request for Exemption from Posting” form
    - The exemption request form should be submitted electronically to the Office of Institutional Equity with a request to review and approve or deny
    - OIE will review the information and respond to the requestor
    - If approved, the requestor may include the approved exemption request form in the employment file upon submission
    - If denied, the position may be subject to competitive search
  - Additional criteria to be considered for the process of non-competitive appointment of project resources
    - Recommended criteria
      - Position in question requires a unique skillset held by a particular candidate
        + Knowledge of existing processes
        + Knowledge of existing systems
        + Knowledge of existing integrations
        + Knowledge of existing pain points associated with processes and systems
      - Staffing the position in question with a particular candidate is deemed to be in the best interest of the institution
    - ERP project positions will be posted (if needed) by UCF HR resources

Backfill Approach
Backfill will be provided using limited term (visiting or interim) positions and will be allocated as determined necessary by unit-level leadership

- Please note that interim positions do not have a defined term, while visiting positions are capped at four years
- All roles requiring 100% FTE effort will be considered to require temporary backfill unless otherwise noted
- For roles requiring less than 100% FTE effort, units may or may not deem it necessary to backfill vacated responsibilities
  - Backfill should be considered to support business continuity but should be aligned to transactional or operational responsibilities if possible (subject to supervisor review and approval)
- Positions providing backfill support should be carefully monitored and documented to provide leadership with visibility necessary to determine if they should be sought as a permanent hire following their limited term backfill assignment
- Backfill positions will be posted (if needed) by home unit resources

Reporting Relationships
Formal reporting relationships and attendant responsibilities (e.g., performance management) will be dependent on effort committed (i.e., % FTE)

- ERP project team members committing 100% effort to the implementation project will report directly to project leadership (i.e., workstream leads) for the duration of the project
- ERP project team members committing less than 100% effort to the implementation project will continue to report to their home unit and will have a “dotted line” reporting relationship to project leadership
Compensation / Rewards

Additional compensation provided to ERP project team members will be allocated based on several criteria:

- All additional compensation considerations will be made in partnership between project leadership, home unit leadership, and UCF HR Compensation, and will be predicated on a sustained performance above and beyond standard job duties.
- If warranted by the job duties performed to support the ERP project, additional compensation will be incorporated into base salary for individuals occupying key positions requiring 100% dedication of FTE effort to the project, and will be provided as a Temporary Pay Increase for positions requiring dedication of less than 100% FTE effort.
- All additional compensation requests will be reviewed and approved or denied by a compensation committee:
  - Committee members will include Maureen Binder, Mike Sink, Kathy Mitchell, Paige Borden, and the ERP Project Manager.
  - The ERP project compensation committee will be supported in decision-making efforts by UCF HR Compensation.
  - Additional compensation requests will be subject to local review and approval processes by home unit leadership, ERP project leadership, and work stream leadership prior to submission to the ERP project compensation committee.
- Additional compensation may be considered for resources committing 25% FTE effort or greater to the ERP project and will be funded using ERP project budget (subject to review and approval by the ERP project compensation committee as noted above).
- ERP Project team resources:
  - Additional compensation may be monetary or non-monetary (e.g., expression of gratitude by leadership, meals in recognition of effort).
  - Additional compensation will be allocated using a tiered system based on commitment of FTE effort to the project.
  - Additional compensation will be aligned to performance within project roles as assessed by project leadership in coordination with UCF HR Compensation.
  - Depending on the nature of the ERP project team role, additional compensation may be provided on a quarterly, monthly, or bi-weekly basis.
- Backfill resources:
  - All project resources will be funded using project budget, which will be allocated according to percentage of time committed to the ERP project.
  - Units may fund backfill requirements using residual unit-level budget which will become available as compensation for project resources is absorbed completely or in part by the ERP project budget.

Annual Leave

Efforts will be made to ensure that commitment to the ERP project team does not result in interruption of planned annual leave benefits:

- Project resources may be limited in their ability to take annual leave, particularly during critical points in the project timeline (e.g., blackout dates).
- Efforts will be made to make project resources “whole” as it pertains to annual leave to avoid an unfair disadvantage in this regard (e.g., carryforward).

Back Office Procedures

Procedures supporting the ERP project team hiring process will leverage dedicated HR staff in the interest of expediency:

- UCF HR will provide a single search coordinator to support all ERP project team hiring efforts.
- UCF HR Compensation will be responsible for reviewing ERP project team positions and aligning to existing UCF position descriptions.
- UCF HR Talent Acquisition will be responsible for posting ERP project team positions once position descriptions have been finalized by UCF HR Compensation.
- Function-specific hiring panels will be formed and will assume responsibility for supporting all ERP project team hiring activity for their respective functions:
  - ERP project team leads should be included as members of the hiring panel.