

**Building Partnerships to Enhance Administrative Effectiveness:
The University of Florida's Pro3 competency model and training series**
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Abstract

The University of Florida implemented an Enterprise Resource Planning (ERP) system in 2004. Despite the best efforts of the institution to prepare the campus community for the transition to this new decentralized system (financial and human resource modules), go-live training was seen as inadequate, and staff members' ability to complete needed business transactions correctly was diminished.

In response to this, the University of Florida's Training and Organizational Development team conducted focus groups and interviews of "star performers" on campus who had gone through the ERP transition effectively to begin to identify the knowledge, skills, and behaviors administrative professionals needed to be successful given the new business requirements of the university.

From this process, the team identified competencies—that is, knowledge, skills, and behaviors—in three key areas: fiscal management, human resources/payroll, and academic department support. Then, by partnering with subject-matter experts across campus, the team launched its "Pro3" training series as a way to cultivate these competencies in staff so that they could more successfully manage business transactions and support the business needs of the institution.

The University of Florida's Pro3 series, therefore, is designed to increase the knowledge and skills of administrative professionals in the three aforementioned areas. Linked directly to the identified competencies needed by UF employees, this series focuses on cultivating skills and knowledge in areas such as accounting, budget development, fund and spending knowledge, completing hiring and appointments, problem solving, and analytical thinking.

Since launching the program in the fall of 2006, evaluative data have indicated an increase in understanding and ability to complete transactions, with a reported reduction in errors. This program was designed and implemented without any new resources or funding. Workshops are currently offered free of charge, and more than 10,000 participants have attended the Pro3 workshops since the series' implementation.

By participating in the program, participants are more readily able to:

- 1) Navigate the complexities of the university's financial and organizational structure
- 2) Understand and manage fiscal transactions and budget information in a timely and responsible manner—thereby serving as good stewards of the university's resources (funding from state appropriations, sponsored projects, auxiliaries, component units, returned overhead, etc.)
- 3) Maintain the university's commitment to its "human capital" by completing human resources and related payroll transactions efficiently and effectively
- 4) Provide appropriate assistance with the tenure and promotion application process as well as related academic activities
- 5) Comply with related university, state, and federal requirements

Under the Pro3 series, more than 50 subject-matter experts serve as trainers in ongoing classroom instruction. These partnerships have been forged with Audit and Compliance Review, Contracts & Grants, the Division of Sponsored Research, Faculty Development, Finance and Accounting, the Graduate School, Human Resource Services, Institutional Research, the International Center, the Office of the Provost, the Privacy Office, Student Financial Affairs, and the University Registrar.

Introduction of the Organization

The University of Florida (UF) is a major, public, comprehensive, land-grant, research university. The state's oldest and most comprehensive university, UF is among the nation's most academically diverse public universities, with 16 colleges and more than 150 centers/institutes. The university has approximately 50,000 students and is one of the largest universities in U.S., with approximately 5,000 faculty and 8,500 staff members. On any given payday, more than 24,000 employees will receive a paycheck (counting temporary employees such as student assistants, etc.). UF also has a long history of established programs in international education, research, and service. It is one of only 17 public land-grant universities that belong to the Association of American Universities.

Statement (restatement) of the Problem/Initiative

The University of Florida implemented an Enterprise Resource Planning (ERP) system in 2004. Despite the best efforts of the institution to prepare its campus for the transition to this new decentralized system, go-live training was seen as inadequate, and staff members' ability to complete needed business transactions correctly was diminished. In response to this, the University of Florida's Training and Organizational Development team (UF T&OD) conducted focus groups and interviews of "star performers" on campus who had gone through the ERP transition fairly smoothly to begin to identify the knowledge, skills, and behaviors needed to be successful as an administrative professional given the new business requirements of the university. From this process, the team identified competencies—that is, knowledge, skills, and behaviors—in three areas: fiscal management, human resources/payroll, and academic department support. Then, by partnering with subject matter experts (SMEs) across campus, the team was able to launch its Pro3 training series as a way to cultivate these competencies in staff so that they could more successfully manage business transactions and support the business needs of the institution. Since launching the program, evaluative data have indicated an increase in understanding and ability to complete transactions. Core offices also have reported reductions in errors.

Design

In consultation with college-level representatives and core offices (Finance and Accounting, Human Resource Services, etc.), UF T&OD conducted focus groups and interviews of “star performers” on campus to begin to identify the knowledge, skills, and behaviors needed to be successful as an administrative professional given the new business requirements of the university. Questionnaires were also used to further define competencies. The competencies from this process were then vetted back through the core offices as well as the key college representatives.

From this process, the team identified competencies in three areas: fiscal management, human resources/payroll, and academic department support. Then, by partnering with SMEs across campus, the team was able to launch its Pro3 training series as a way to cultivate these competencies in staff so that they could more successfully manage business transactions and support the business needs of the institution. Varying models were used for curriculum design—UF T&OD designed certain workshops, receiving feedback from subject-matter experts. Other times, UF T&OD reviewed content developed by the SMEs and provided feedback about adult learning principles, etc., to them. For continuity, all workshops use a Pro3 training template. UF T&OD establishes the training schedule each semester; handles communication; is responsible for materials (handouts, rooms, etc); and manages registration, records, and certification.

Since launching the program, level-one evaluations have been very positive, and more detailed evaluative data have indicated an increase in understanding and ability to complete transactions. Core offices also have reported reductions in errors. No additional personnel were added, and this new initiative was unfunded—instead, we leveraged existing resources of the institution to meet this need.

Implementation

To implement the series, after the competencies were developed, UF T&OD completed a gap analysis to identify training that already existed which could be used to cultivate identified competencies. We also identified training that needed to be developed. The team was able to use some existing workshops—plus, 25 new Pro3 workshops were developed. As noted above, UF T&OD designed certain workshops, receiving feedback from subject matter experts, or SMEs. Other times, we reviewed content developed by SMEs and provided feedback about adult learning principles, etc. For continuity, all workshops use the Pro3 training template.

Our model for launching the workshops evolved to include a three-tiered approach: practice session, preview session, and then “go-live” training. We launched the Fiscal Management track in fall 2006, the HR/Payroll track in summer 2007, and the Academic Department Support track in spring 2008. We currently use more than 50 subject-matter experts in the classroom—although, on occasion, we also use T&OD professionals. Our office establishes the training schedule each semester; handles communication; is responsible for materials (handouts, rooms, etc); and manages registration, records, and certification.

Benefits

Since launching the program, evaluative data have indicated an increase in understanding and ability to complete transactions. Core offices also have reported reductions in errors. By participating in the program, participants are more readily able to:

- 1) Navigate the complexities of the university’s financial and organizational structure
- 2) Understand and manage fiscal transactions and budget information in a timely and responsible manner—thereby serving as good stewards of the university’s resources (funding from state appropriations, sponsored projects, auxiliaries, component units, returned overhead, etc.)

- 3) Maintain the university's commitment to its "human capital" by completing human resources and related payroll transactions efficiently and effectively
- 4) Provide appropriate assistance with the tenure and promotion application process as well as related academic activities
- 5) Comply with related university, state, and federal requirements.

More than 10,000 participants have attended the Pro3 workshops since implementation in the fall of 2006.

Retrospect

The Pro3 training series involves many workshops and requires a significant investment of time from administrative professionals participating in the program. At present, employee certification is not required, but many colleges and departments have decided to require the training as part of their own protocol. The curriculum, at this point, is delivered in the classroom. To improve access and to promote "just in time" training, we are making some of our Pro3 content available online as e-learning sessions. Not only will this make taking the classes more convenient and may reduce the amount of time required to complete a certification, this shift to online accessibility will make the curriculum available to an even broader audience than those administrative professionals for whom the sessions were originally designed.

While our attendance and participation numbers are high—and our evaluative data also have been very strong—we also will be adding an "assessment" or "testing" component to more formally assess learning transfer. Institutionally, we believe it is important for the university to begin to focus on the skill set, aptitude, and experience of those being hired into administrative roles using the competency model. This would include asking behavioral-based questions, for example, especially for those competencies difficult to cultivate, such as "initiative."

The role of the supervisor should not be underestimated—in many cases, we found that supervisors did not know what their administrative staff were expected to be able to do in the business practice/transaction arena. To help with that, we are currently completing a management/leadership competency project at UF and anticipate integrating some of the Pro3 content (e.g., financial training) into training for UF managers as a result.