Support in Department

Dean

Chair/A.D.

key department administrator

additional support staff

Chair/A.D.

functional support, managed by others
Support at Faculty Level

Dean

Executive Officer

Director of Advancement

Faculty Financial Officer

Common to all faculties
Faculty Financial Officer

Financial Management

• Reporting, audits
• Compliance, Expenses

Financial Planning

• Multi-year budgets
• Financial impact analysis
• Fund forecasts (trusts, research)
• Scholarship agreements

Financial Training
Director of Advancement

Development Goals and Priorities

Fundraising and Donor Relations

- Develop Terms of Reference
- Relations with Donors
- Campus Visits

Alumni Relations

- Events
Executive Officer

Human Resources
• Staff structures, skills, recruitment
• Support for faculty

Other Resources
• Finances
• Space

Policy and Legal
• Policy guidance
• Committees and Councils
• External agreements
• Privacy and Record Management
# Support Provided re: Staff

<table>
<thead>
<tr>
<th>Functional Direction</th>
<th>Goal-setting</th>
<th>Recruiting</th>
<th>Resource changes</th>
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<tr>
<td>Training</td>
<td>Coaching</td>
<td>Performance Management</td>
<td>Organizational Changes</td>
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<tr>
<td>Attendance</td>
<td>Performance Reviews</td>
<td>Career planning</td>
<td>Conflict Management</td>
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Department/School staff | Executive Officer
## Support Provided re: Faculty

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<th>Appointments</th>
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<th>Salary Increases</th>
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<td>Tenure and Promotion</td>
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<td>Onboarding</td>
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**Department/School staff** → **Executive Officer**
<table>
<thead>
<tr>
<th>Time</th>
<th>Subject</th>
<th>Presenters/Guests</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:30-9:00</td>
<td>Coffee, tea, and welcome.</td>
<td></td>
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<tr>
<td>9:00-11:00</td>
<td>Academic leadership at Waterloo.</td>
<td>Katrina Di Gravio, Director, Organizational and Human Development (OHD).</td>
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<tr>
<td>9:00-10:00</td>
<td>Leadership and its challenges in an academic world: how to survive.</td>
<td>Sheila Ager, Director, Academic Leadership Program (ALP).</td>
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<tr>
<td></td>
<td>Presentation, questions, and discussion.</td>
<td></td>
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<tr>
<td>10:00-11:00</td>
<td>The Waterloo working environment.</td>
<td>Matt Erickson, Director, Conflict Management and Human Rights Office (CMHRO).</td>
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<tr>
<td>10:00-11:15</td>
<td>Break.</td>
<td></td>
</tr>
<tr>
<td>11:00-12:00</td>
<td>Wellness: physical and psychological health in the workplace.</td>
<td>Linda Brogden, Manager, Occupational Health.</td>
</tr>
<tr>
<td>11:15-12:00</td>
<td>Lunch.</td>
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<tr>
<td>12:00-1:00</td>
<td>Lunch.</td>
<td></td>
</tr>
<tr>
<td>1:00-3:00</td>
<td>Becoming a Chair.</td>
<td>Sheila Ager, ALP and Former Chair, Classical Studies.</td>
</tr>
<tr>
<td>1:00-2:30</td>
<td>Chair duties, responsibilities, and accountabilities.</td>
<td>David Taylor, Former Chair, David Cheriton School of Computer Science.</td>
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<tr>
<td></td>
<td>The Chairs’ Handbook.</td>
<td></td>
</tr>
<tr>
<td>2:30-3:00</td>
<td>Some examples of legislation.</td>
<td>Joyce Barlow, Accessibility for Ontarians with Disabilities (AODA) Specialist, HR.</td>
</tr>
</tbody>
</table>
Tips for Effective use of provided support

• Briefing meetings
  – With your EO
  – With your FFO, review budget and expectations
  – With your administrator; review Chair Timeline

• Be mindful of downward communication
  – Consider regular meetings to touch base

• Understand functional direction vs. management responsibility