

# CHANGE MANAGEMENT IN ACTION

## Welcome to Change Management @ Waterloo

The University of Waterloo's strategic plan, *Connecting Imagination with Impact*, acknowledges we live in an era of rapid change and institutionally are built on a foundational "willingness to take risks and embrace new approaches". We acknowledge that to remain competitive, to respond to challenges both external and internal and to prepare for our future, the University of Waterloo needs to be flexible, resilient, and agile. In essence, the University of Waterloo needs to adapt to and adopt change.

Under the direction of the Associate Provost Human Resources, the University of Waterloo offers a campus wide streamlined approach to managing change initiatives and is committed to supporting employees as they navigate through change.

Employees experiencing change have access to Change Management programming and the Continuous Improvement & Change Management Community of Practice.

Additionally, managers and supervisors leading change have access to a variety of services, equipping them with the necessary skills and tools to support their team members, anticipate areas of resistance and proactively address concerns to optimize change results.

Services offered include consultation with Change Management Prosci certified representatives and access to resources, tools and templates.

Learn more about change management at Waterloo



1

Change Management Advisor  
(Enterprise-wide initiative support)

8

Human Resource Partners  
(Faculty, Department & unit level support)

16

Conference sessions / presentations  
and panel discussions

1

Continuous Improvement & Change  
Management Community of Practice

*"The 2FA change champions acted as "insiders" with direct access to those managing the service. effectively serving as an extended support network. They also served as advocates for those affected by the change, facilitating two-way communication between those introducing the change and those affected by the change."*  
Project Sponsor | 2FA

*"An understanding of how the change impacts the various stakeholders in clear terms that resonate with the different audiences positions the project team well to successfully transition operations and educate those who may be impacted"*  
Project Sponsor | LTD Benefits

## Enterprise-wide activities

2019

Projects supported:  
Two-Factor Authentication (2FA)  
Holistic Benefits Review

Resources:

Change Management Website  
2FA Change Champions

2020

Projects supported:  
Virtual Convocation  
OneDrive Advocacy  
Return to Campus & Work from Home interim guidelines  
M365 Program  
WCMS 3.0  
External Examiner Payment Process

Resources:

M365 Program Change Champions  
Change Management tools and templates

2021

Projects supported:  
Policy 14  
LTD Benefits  
Extended Health Care & Dental Benefits

Resources:

Change Management Programming  
Continuous Improvement & Change Management Community of Practice

2022

Projects supported:  
Talent Acquisition

Resources:

Change Management micro learning  
Sizing the change tool

## ON THE HORIZON

Projects:

UG Admissions Process Review  
Academic Calendar and Curriculum Management

*"Incorporating Change Management into the External Examiners project was key as the project impacts several stakeholders on-campus: namely the Faculties, HR, Finance, Payroll and the External Examiner themselves. From the point of mapping out the current state to gathering requirements to the launching of the new system and finally to the adoption of the new system, the CM lens has been vital to affirming the need for the change, assessing and addressing stakeholder reactions at every phase of the project and developing appropriate communication strategies."*  
Project Leads | External Examiner

*"Leveraging the ADKAR model for the N: to OneDrive migrations helped us ensure our clients and IT support staff understood the change and the benefits of OneDrive, knew why it was happening, had the training and knowledge they needed, understood the process and how to get support, and had ongoing training available to them."*  
Project Lead | N: to OneDrive migrations

# Building Community Through a Culture of Learning and Development

## Learn with us!

We offer on-campus workshops for employees on a variety of topics. In addition, we provide customised training solutions to our University colleagues.

To learn more, contact a member of our team:

Change Management: [ChangeManagement@uwaterloo.ca](mailto:ChangeManagement@uwaterloo.ca)

Organizational and Human Development: [OHD@uwaterloo.ca](mailto:OHD@uwaterloo.ca)

Project Management: [connie.vanoostveen@uwaterloo.ca](mailto:connie.vanoostveen@uwaterloo.ca)

## Join our communities


**Continuous Improvement & Change Management Community of Practice**



**Organizational and Human Development Learning & Development Community of Practice**



**Project and Portfolio Management Community of Practice**




### CHANGE MANAGEMENT

4

Employee focused workshops

463

Course participants

8

Customised course requests

4

Community of practice sessions

183

CoP members



SCAN ME

*"This workshop is a must for anyone who is experiencing change in their personal or professional lives."*  
Change Management workshop participant

Organizational & Human Development is committed to advancing and supporting the personal and professional growth of University of Waterloo employees to reach their highest potential. OHD's mission is accomplished by creating innovative learning opportunities, cultivating collaborative partnerships, and engaging the campus community in lifelong learning.

### ORGANIZATIONAL AND HUMAN DEVELOPMENT

80+

Employee focused workshops (per year)

1580+

Course participants (per year)

40+

Customised course requests (per year)

20

Community of practice sessions (to date)

39

CoP members



SCAN ME

### PROJECT MANAGEMENT OFFICE

5

Employee focused workshops

673

Course participants

7

Customised course requests

32

Community of practice sessions

200+

CoP members



SCAN ME

The Project & Portfolio Management community of practice is an environment open to UW employees and students interested in sharing experiences, ideas, best practices and lessons for managing portfolios and projects.

# Two projects use of PM + CI + CM to deliver outcomes

## 1. PMO Methodology project

Using **Agile tools and techniques**, the PMO team of project managers is able to learn and apply new project management tools and techniques while continuously delivering improvements to PMO services and resources.

## 2. Move to SharePoint Online project

Measuring progress and health of the Move to SharePoint Online project was a challenge for the project. Using a combination of **Agile Kanban and Flow** approaches, along with sizing and complexity techniques, the team was motivated in a data-driven way. Change management was integrated into the project through the M365 program.

### Needs

Continuously improve resources, tools and techniques

Learn and build confidence in Agile skills

A motivated team

Tracking project status and progress

Tracking work and assignments

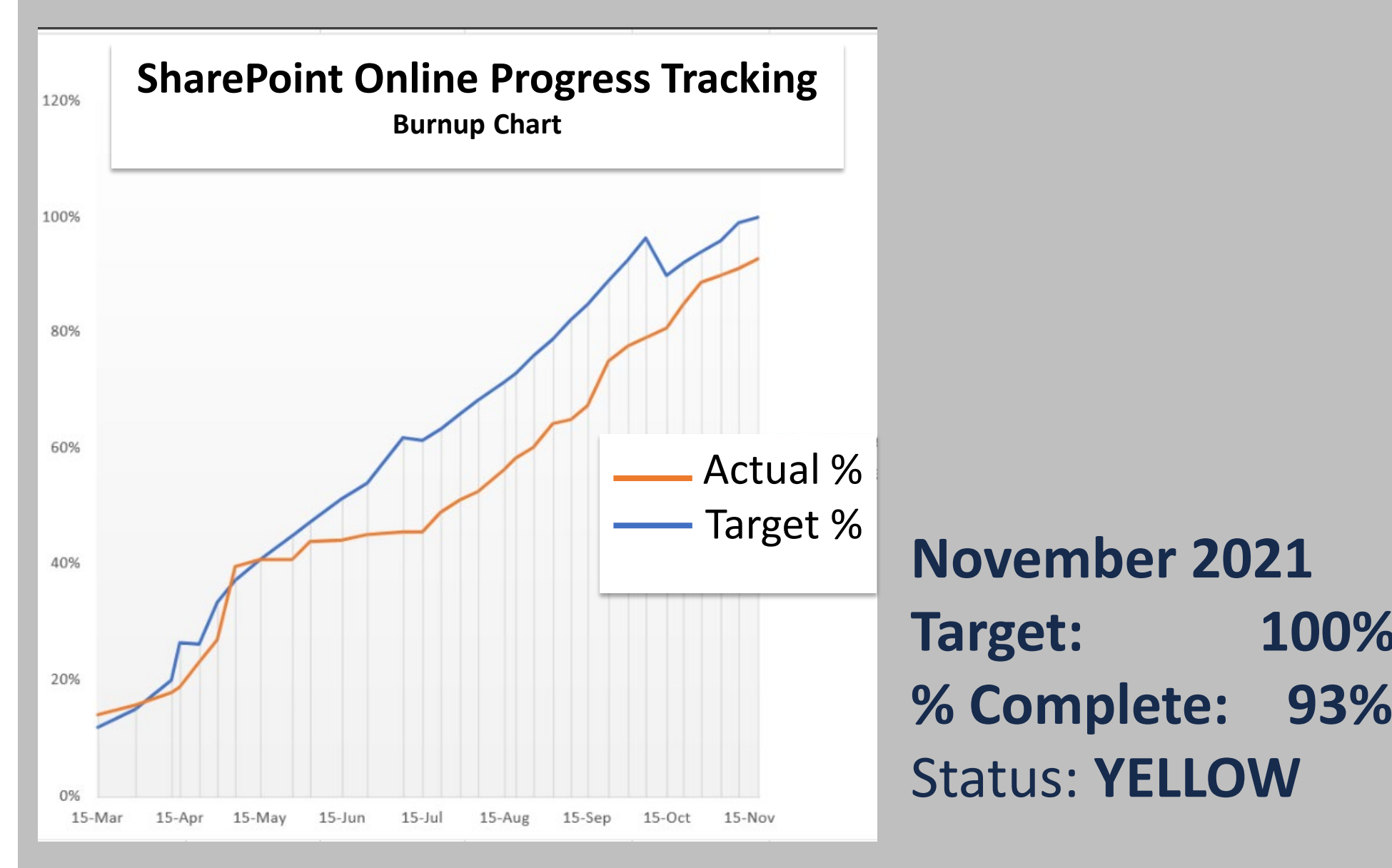
Setting priorities

Repeatable processes

Learning from mistakes as we go along

Adaptable scope and changes

SharePoint Online needed change management tools



### Tools & Techniques

Maturity Model/Roadmap

SWOT Brainstorming

**Methodology Agile tools/techniques:**

- Charter
- Relative Estimation/Prioritization
- Backlog
- Backlog Grooming
- Monthly Planning/Retropectives
- Standups

**SharePoint Agile tools & techniques**

- Site inventory
- Kanban Flow: Not started, Assessing, Staging, Migrate, Done
- Complexity: Highly Complex, Complex, Moderate, Simple
- Earned Points = Flow state + Complexity
- Total Project Points
- Velocity
- Burnup
- Status reporting
- Charter
- Planning/Retropectives

### Results

PMs can work in a safe space, learn new skills, and try out new techniques and tools (CI, CM, PM)

Gives PMO capacity to work on priorities (e.g. focus on WCMS 2 to 3, create and deliver pilot workshops) (PM, CI)

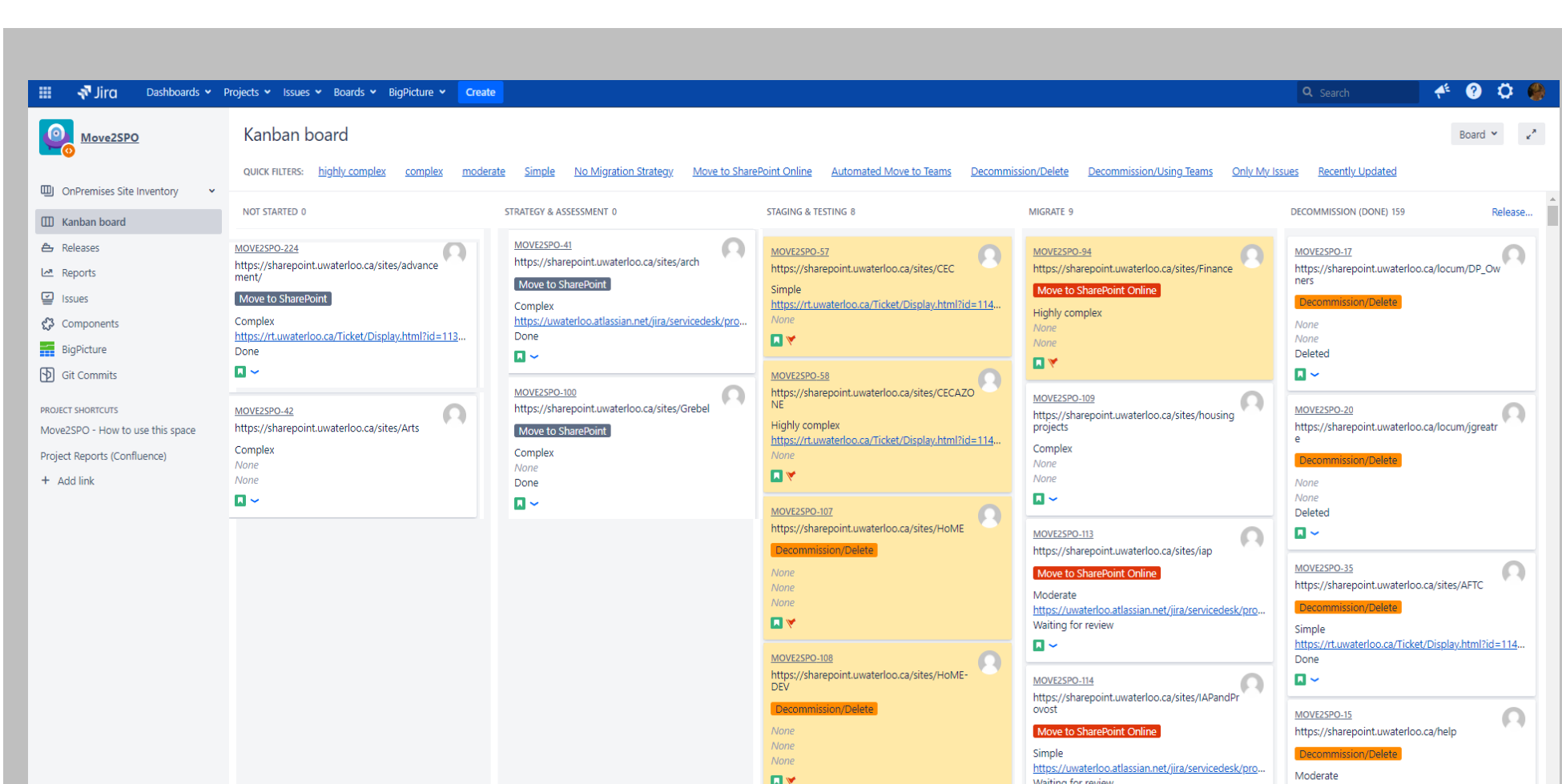
Through retrospectives, find better ways of working by talking about what works and how we can improve (PM, CI, CM)

Work as a team and build trust (PM, CI)

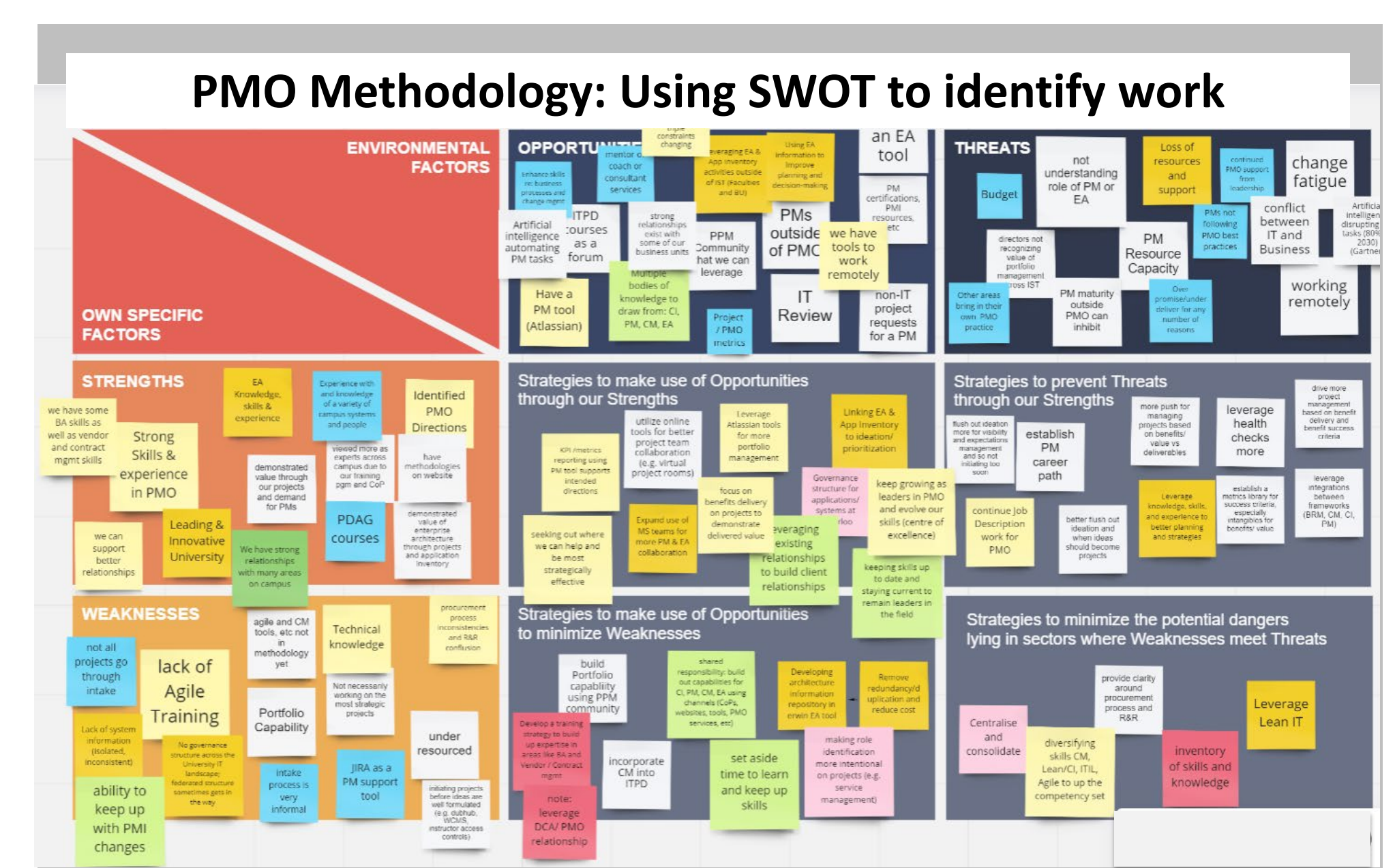
Team motivated to hit targets, and involved in setting /adjusting targets based on velocity (PM, CI)

Status based on data for SharePoint Online (PM, CI)

SharePoint Online within M365 program (PM, CM)



**Kanban Flow:**  
Not started | Assessment | Staging | Migrate | Done



# Supporting the call back to campus: Transforming the way we learn to lead and work in hybrid teams

From conception to reality

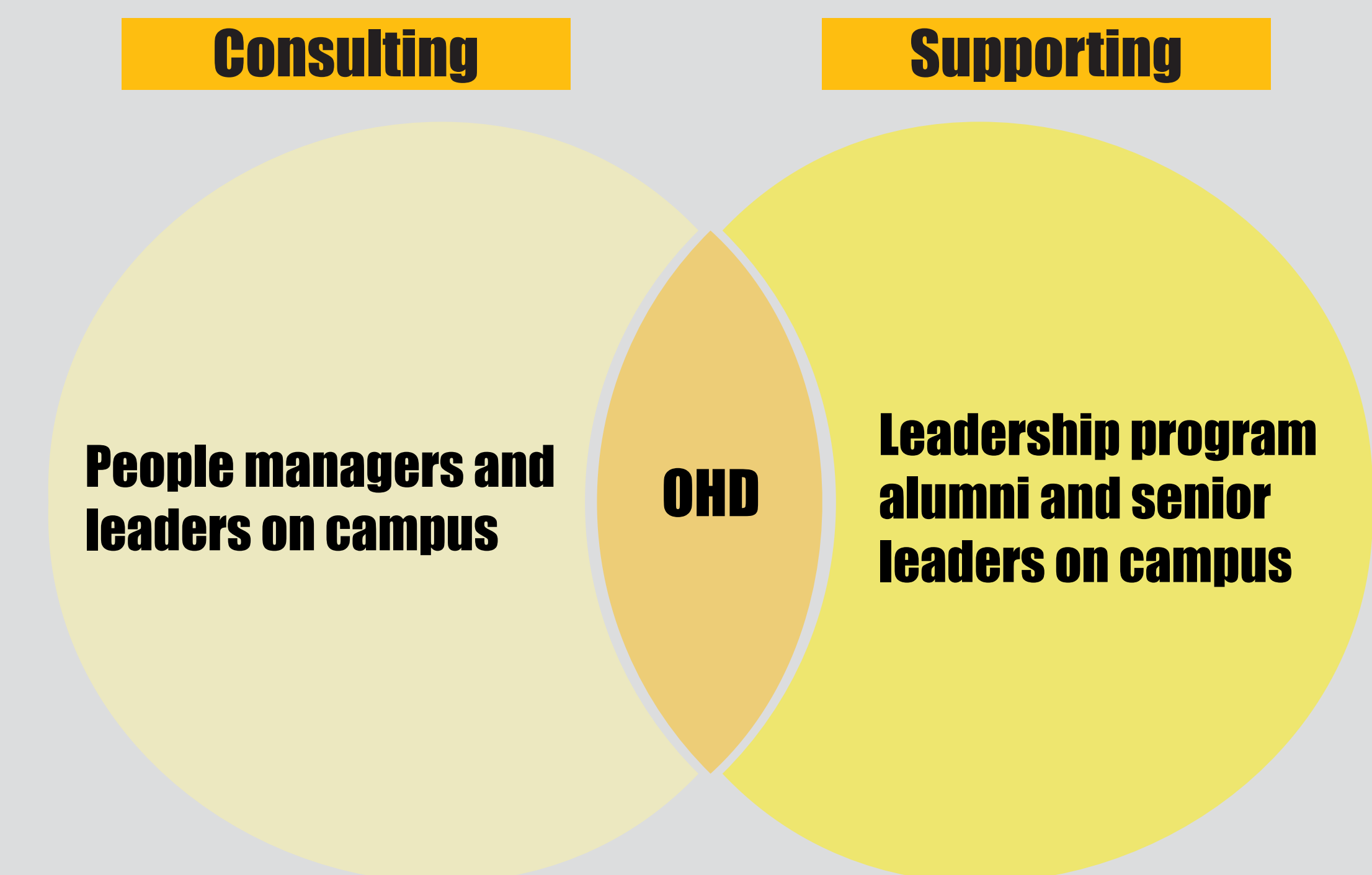
## Our story

*How did you personally feel about the call back to campus?*

*Leading & Working in Hybrid Teams* showcases OHD's support for the back-to-campus transition by responding to the novel challenges of learning how to lead in hybrid, blended, and HyFlex environments. Our collective effort resulted in OHD's foray into developing a micro-learning series using the PebblePad platform. With the support of managers and leaders, we highlight employees' immediate needs and concerns to help managers initiate a conversation about the call back to campus.

We will share how this pilot project contributes to transforming the way we design and deliver OHD's future synchronous and asynchronous program offerings.

## Our stakeholders



Evaluation strategy: Focus groups and qualitative surveys  
Program delivery: Integrative learning with LEARN and PebblePad

## Our vision

Design and develop an agile, self-directed resource that adapts to the growing needs of the University of Waterloo's community in working in hybrid and blended environments.

## Our challenges

- An open and accessible learning for all campus employees to support leading and working in hybrid teams
- Agile micro-learning modules that adapt to rapidly evolving topics & trends
- A continuous program offering

## Our strengths

- Connecting seemingly unconnected ideas to understand the overarching theme
- A trusted partner in our campus community
- Resourcefulness and expertise in learning and development methodologies
- Active collaborations with campus partners

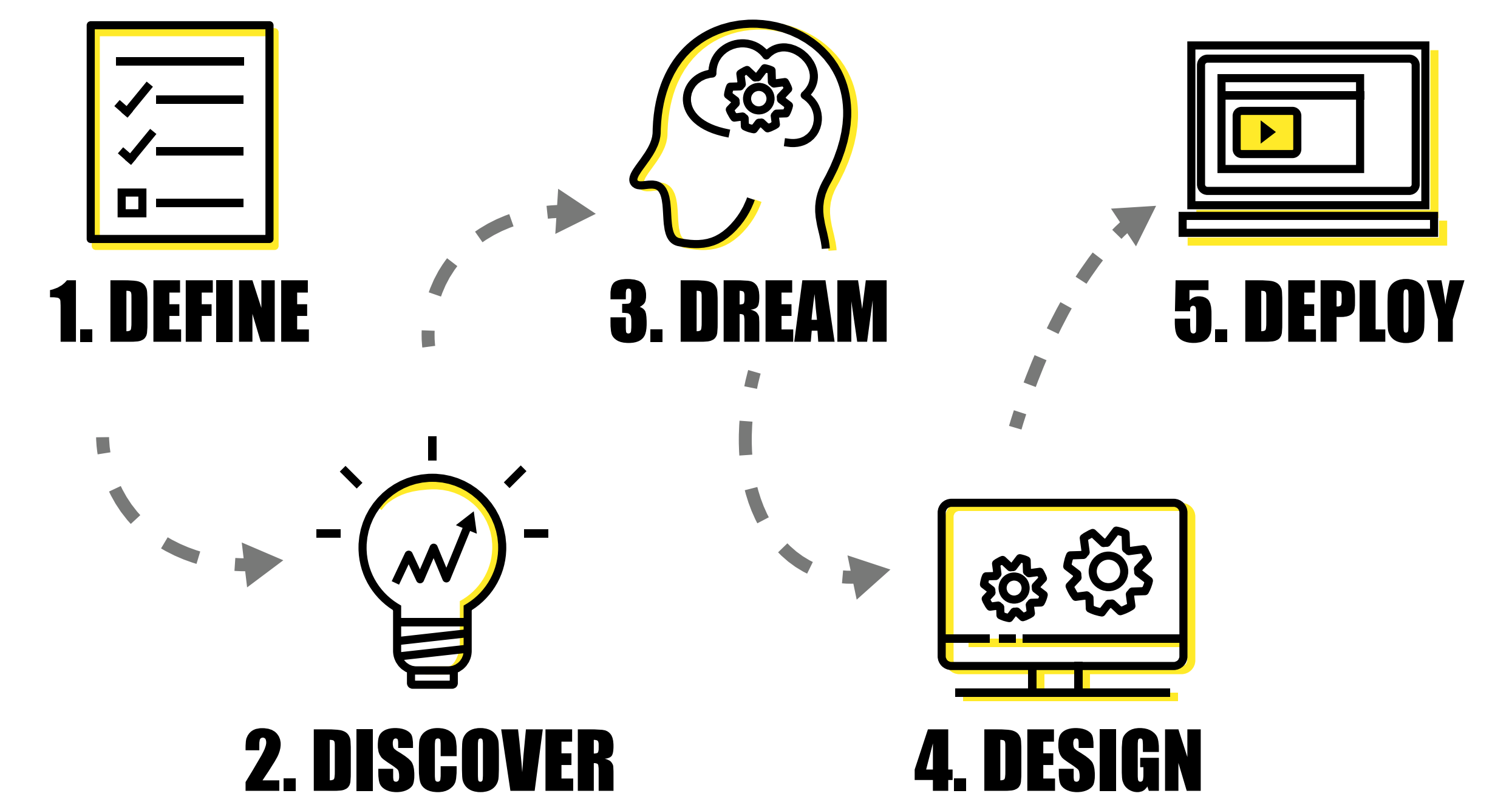
## Our action steps

Consultations using focus groups and qualitative surveys

Understand the online and self-directed learning needs of adult learners

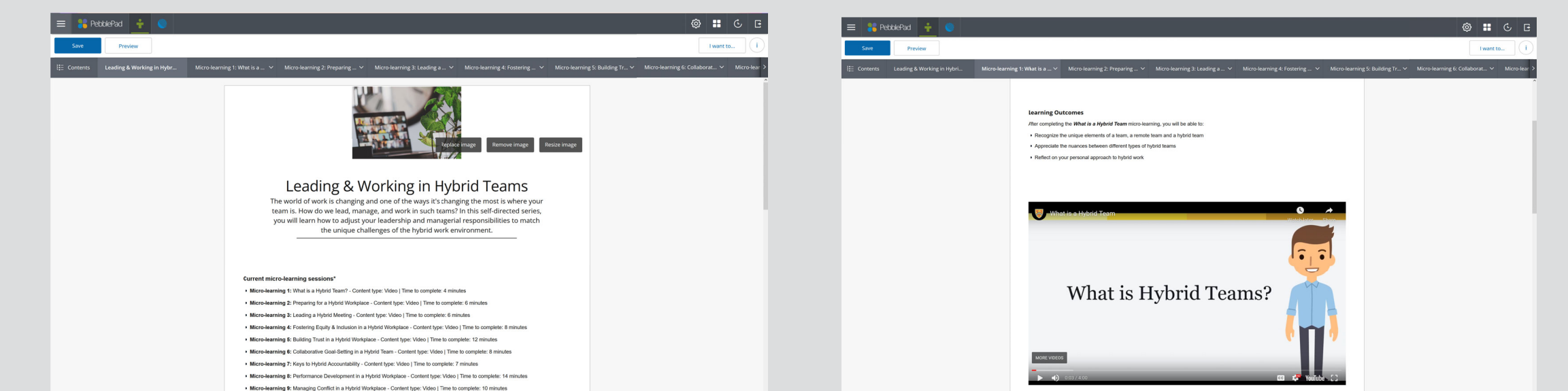
Evaluate online tools: adaptable accessible engaging licensed

## THE APPRECIATIVE INQUIRY PROCESS



## Our program offering

- We designed and developed asynchronous online learning modules to prepare managers and leaders for a successful transition to a hybrid, blended, and HyFlex work environment
- We used an existing University of Waterloo resource to mitigate the cost of program deployment (i.e. PebblePad)



Micro-learning modules:

- M1: What is a Hybrid Team?
- M2: Preparing for a Hybrid Workplace
- M3: Leading a Hybrid Meeting
- M4: Fostering Equity & Inclusion in a Hybrid Workplace
- M5: Building Trust in a Hybrid Workplace
- M6: Collaborative Goal-Setting in a Hybrid Team
- M7: Keys to Hybrid Accountability
- M8: Performance Development in a Hybrid Workplace
- M9: Managing Conflict in a Hybrid Workplace
- M10: Leveraging Accessibility in the Hybrid Workplace
- M11: Understanding Change Management

## Ready to start?

Are you ready to start *Leading & Working in Hybrid Teams*? Scan the QR code for OHD's *Leading & Working in Hybrid Teams* website and registration.



UNIVERSITY OF  
**WATERLOO**

Organizational and  
Human Development

# Opening a Rapid Antigen Screening Site in Davis Centre (DC)

## Purpose of the project:

**Open a Rapid Antigen Screening site at the Davis Centre (DC) on June 21, 2021 for eligible students and employees.**

## The Project/CI Framework:

**The PDCA cycle (Plan, Do, Check, Act) is a continuous loop of planning, doing, checking, and acting.**

**The approach tackles solving problems and managing change through consistent analysis to measure success and improve the project process.**

**Folding this cycle into traditional project framework capitalizes on utilizing lessons learned from previous cycles of work in upcoming deliverables.**

## 4. ACT

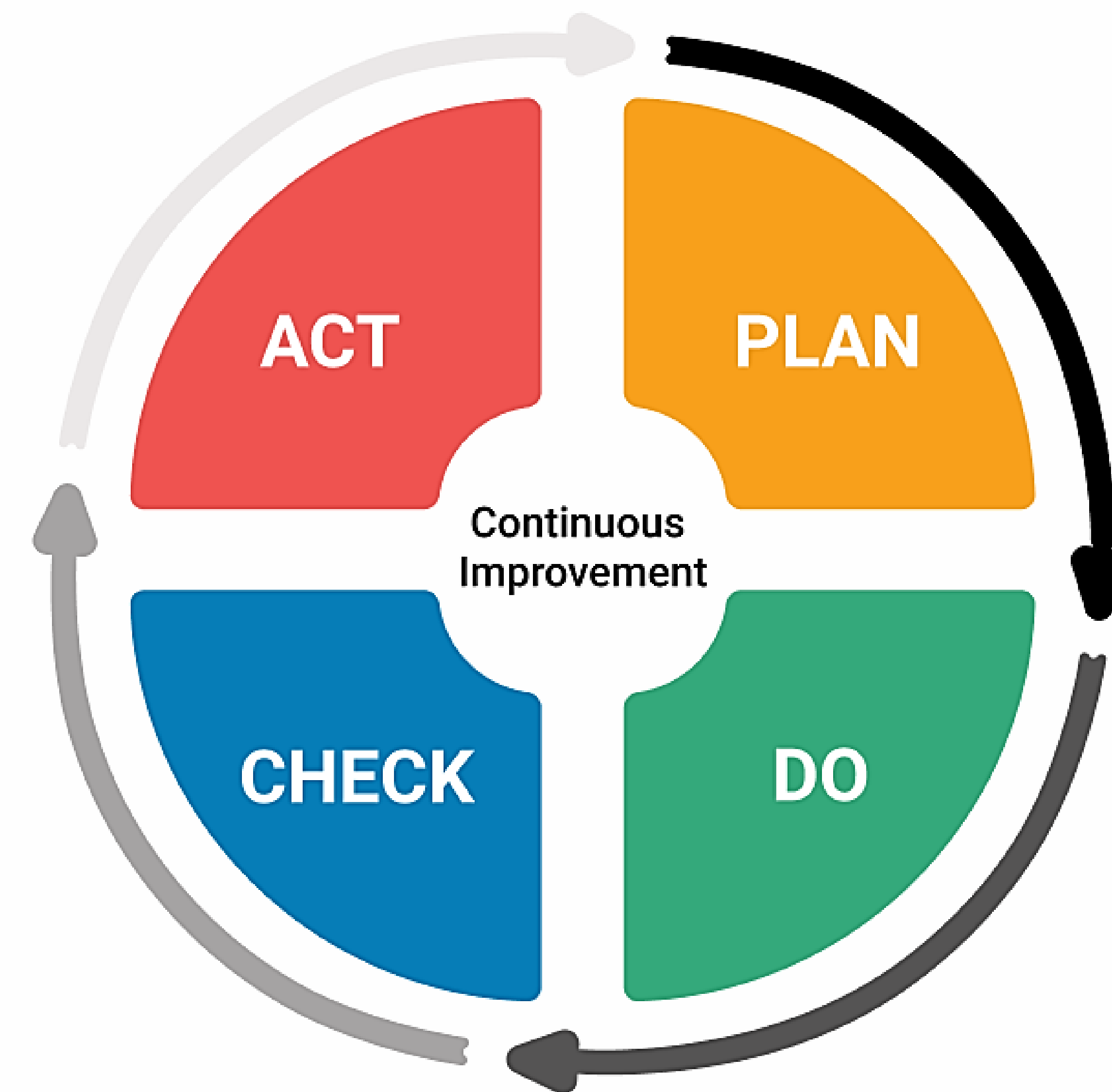
- Continue to implement the plan with lessons learned through CHECK stage
- Capitalize on the productivity and efficiency gains of checking our approach throughout the project
- Adjust the plan based on success measurements to implement next milestones of the project

## 3. CHECK

- Similar to the Monitor & Control phase of the project lifecycle
- Audit the plan's execution
- Identify problematic parts of the current process and eliminate them in the next cycle

Questions to consider for reflection:

- Is our WOW (Way of Working) appropriate?
- Does the project team have the answers required to drive forward milestone completion?
- What barriers arose external to our project?
- What new barriers can be anticipated to require a shift in approach?
- What did we learn to adjust in the next cycle of PDCA?



## 2. DO

- Similar to the Execution phase of the project lifecycle
- Implement the plan, anticipating some new information and unpredicted issues may arise
- Perform roles and responsibilities across the team
- Share progress and confirm next direction with stakeholders and Project Sponsors
- Consider any barriers that exist external to our project for continued risk mitigation

## 1. PLAN

- Similar to the Initiation/Planning phase of the project lifecycle
- Understand the core problem the project purpose will solve
- Establish the goals to be met for project success
- Gather the expertise (Project Team)
- Engage the stakeholders and sponsors
  - Campus Wellness
  - Human Resources
  - Information Systems & Technology
  - Safety Office
- Identify the right requirements
- Plan project milestones according to launch
- Establish our WOW (Way of Working)
  - Project Charter (Scope, Time, Cost)
  - Project sponsor communications and decision matrix

# Admissions Process Review Project

## Admissions Process Review Project Background

With the desire to address potential barriers related to equity, diversity and inclusivity (EDI) and the need to replace OnBase as a document management tool, the RO is doing an end-to-end review of the undergraduate admissions process. Goals of this process review are:

- to ensure possible biases or barriers in the process are understood and addressed, along with recommendations from the President's Anti Racism Taskforce (PART)
- gain increased visibility and understanding of the activities completed in the various Faculties involved in making admission decisions
- identify and examine any opportunities for efficiencies within the process

This project involves a dedicated Project Manager, a Continuous Improvement Specialist, and a Change Management Advisor.

## About Undergraduate Admissions at the University of Waterloo

- Applications to undergraduate studies have been steadily increasing for the past three years.
- Applicants apply from different academic backgrounds and require a unique assessments depending on their academic history and program of application.
- Admissions at Waterloo is a collaborative process between the Registrar's Office and Faculties and Professional schools.
- There are processes and roles related to Admissions across campus. Gaining visibility into this work is key for continued success.

## Key Roles

### Project Manager

- Wendy Hague – PMO, IST

### Continuous Improvement Consultant

- Anuja Bajaj – Continuous Improvement Committee Member

### Change Management Lead

- Samantha Murray – Change Management Advisor

### Consulting Specialists

#### Registrar's Office

- Jessica Parris – Admissions Process Analyst

#### Human Rights, Equity and Inclusion

- Amanda Chrisanthus – Equity Specialist

#### Indigenous Relations

- Jean Becker – Associate Vice-President, Indigenous Relations
- Robin Stadelbauer - Indigenous Relations Coordinator

## Our work so far

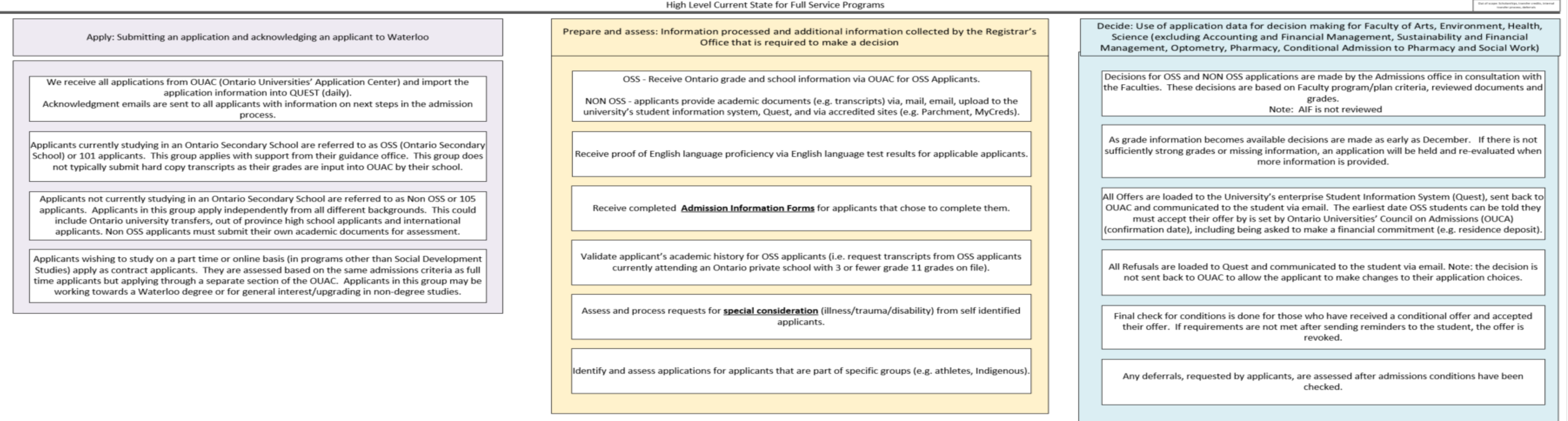
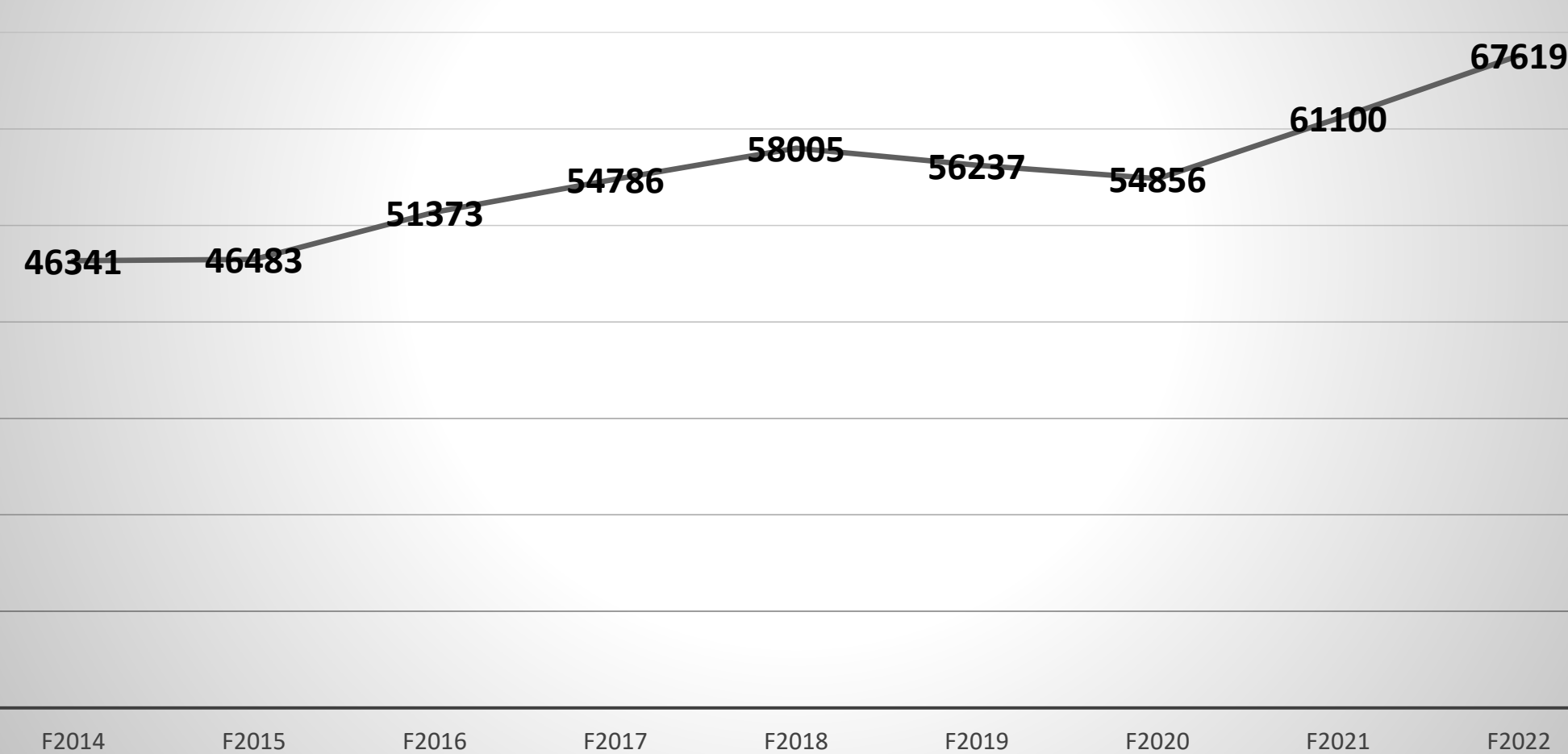
### Project Kickoff

- The project began with a formal kickoff meeting to engage all campus stakeholders.
- The project team was introduced, and stakeholders were introduced to the charter and project plan.
- This was an opportunity to bring *awareness* to the project at multiple levels.

### Current State

- The project team includes a standing CI SME, who co-created process diagrams of the current admissions processes for the different applicant types and program of application.
- The process diagrams were presented to Registrar's Office and campus stakeholders for validation.
- The project Change Management Advisor was present at validation sessions, so they will be prepared to understand the impact of proposed improvements to the process.

Total undergraduate applications received by admit term



## Our Approach



## Re-imagining the Admissions Information Form (AIF)

- A preliminary survey was sent to campus stakeholders to validate how the supplementary application form is used in decision making.
- Stakeholders were asked to indicate their interest in participating in future discussions. Interested parties were invited to an AIF focus group.
- Themes from the survey results were used to create discussion points for a focus group session facilitated by the project Change Management Advisor.

## What's Next

### Analyze Phase

- Dedicated Equity, Diversity & Inclusivity SMEs are reviewing the validated current state diagrams and supporting documents.
- A half day retreat with campus stakeholders is planned to discuss opportunities for improvement to process, efficiencies.

### Future State

- Draft a desired future state based on EDI recommendations, stakeholder feedback and process needs.
- The future state processes will be used to inform the document management business solutions.

## Equity, Diversity & Inclusion Education

- The EDI SMEs were introduced to campus stakeholders where they shared their plans and relevant experience.
- An EDI toolkit and training program has been developed for distribution to the project stakeholders.
- Decolonization resources are being gathered/created to compliment the EDI tool kit.

# Microsoft 365 Program

## The Microsoft 365 Program

Providing you secure, anytime access to the collaboration and productivity tools you need.



Moving to SharePoint Online



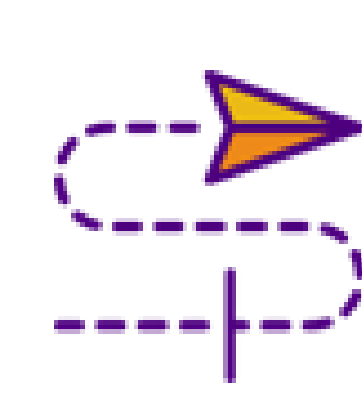
Migrating to softphones



Migrating N: drives to OneDrive



Migrating employee email to O365



Email improvements

Learn more  
[uwaterloo.ca/M365](http://uwaterloo.ca/M365)

## About The Program

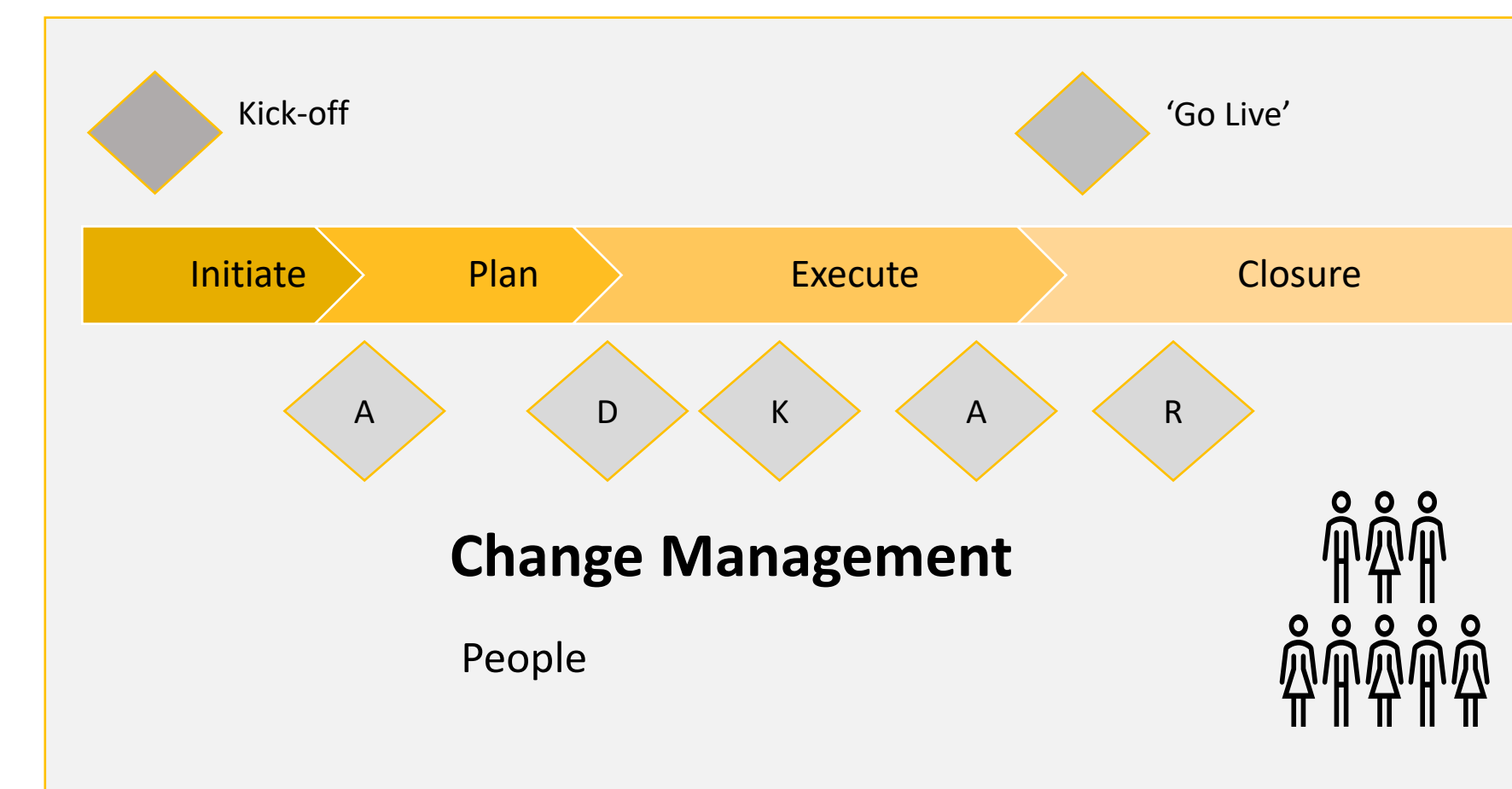
The M365 Program was created to ensure the projects required to transition the University to the M365 cloud environment were coordinated from a resource, technical, and change management perspective.

## Program Objectives

- Minimize disruption to campus
- Minimize any negative impact on campus productivity
- Gain efficiencies, where possible, by coordinating project resources, combining communications, etc.
- Maximize cost savings
- Accommodate unique needs and technology preferences, where necessary, while ensuring data security needs are met and any reputational risks to the University are addressed

## Approach

- **Program management**
  - Oversight on all M365 projects
- **Project Management**
  - Project managers assigned to each project
  - Leveraged Jira Software to track and set goals for SharePoint migrations
- **Stakeholder management**
  - Identified obstacles/concerns of stakeholder groups to address them ahead of time
  - M365 Email consultations
- **Collaboration**
  - Within IST
  - Between IST and Campus IT staff (feedback, support)
  - Consultations with other universities
- **Communications**
  - M365 website
  - Project websites
  - Regular communications to campus stakeholders (FACCUS, CTSC, Academic Support Computer Reps, WatITis, Daily Bulletin, CTSC, etc.)



## Program Benefits

- **Enhanced support for end users** – fewer supported email platforms
- **Reduced costs** – achieved over time through software licensing and on-premise hardware savings
- **Improvements to security** – industry best practices, able to make frequent updates to ensure security is optimized.
- **Enhanced collaboration and productivity** - achieved through use of the M365 suite of products and apps

## Project scope

- Transition to a single tenant for M365
- Migration of Connect on premises and Mailservices email accounts to M365
- Email routing improvements
- Implementation of Cisco anti-malware software
- Move to SharePoint Online
- Migration of N drive to OneDrive for Academic Support Units
- Migration of R drive to SharePoint Online or Teams for Academic Support Units

*“As a project manager, I really appreciate having a Change Management Specialist on the team. They can assess change impacts, develop a communication/stakeholder management plan, and take actions to support the successful adoption of the new product, process or service. It’s great to have this support on the project team and it really makes a difference!”*

## Approach

- **Change Management**
  - Change Management specialist assigned
  - Change Champion network in place
  - Leveraged Prosci ADKAR®
    - Info sessions, knowledge base articles, training, etc.
- **Continuous Improvement**
  - Leverage lessons learned from one project to the next - e.g., SharePoint Online lessons learned can be leveraged for R: drive migration project
  - Ensure benefits realization
  - Governance (Operations and Steering committees, M365 Change Request process)
  - Ongoing training sessions

*“Leveraging the ADKAR model for the N: to OneDrive migrations helped us ensure our clients and IT support staff understood the change and the benefits of OneDrive, knew why it was happening, had the training and knowledge they needed, understood the process and how to get support, and had ongoing training available to them”*



# You ain't hip until you UHIP

Fall 2018

Fall 2018 – Winter 2020

Yes it took 2 Years

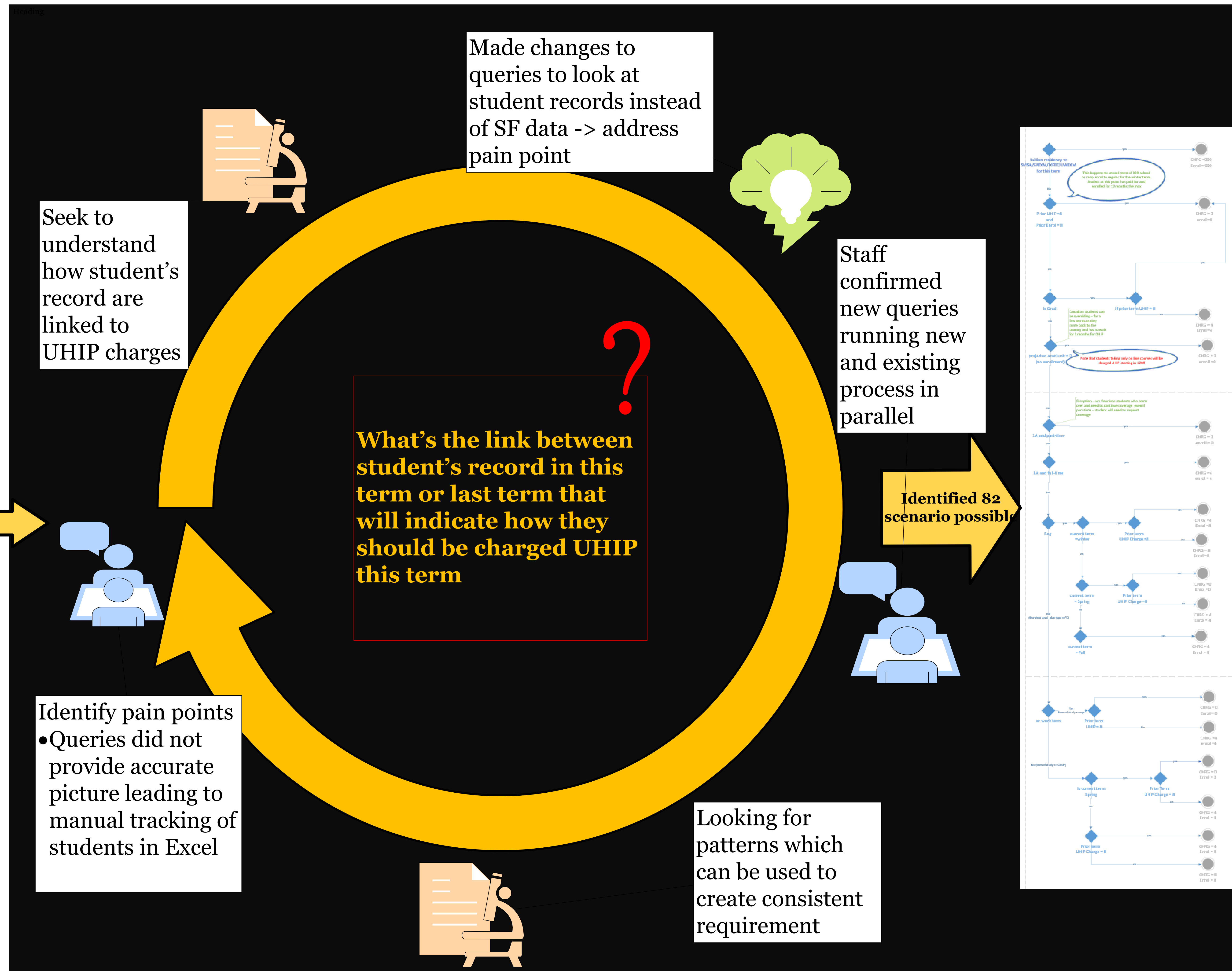
Spring 2020

Fall 2020

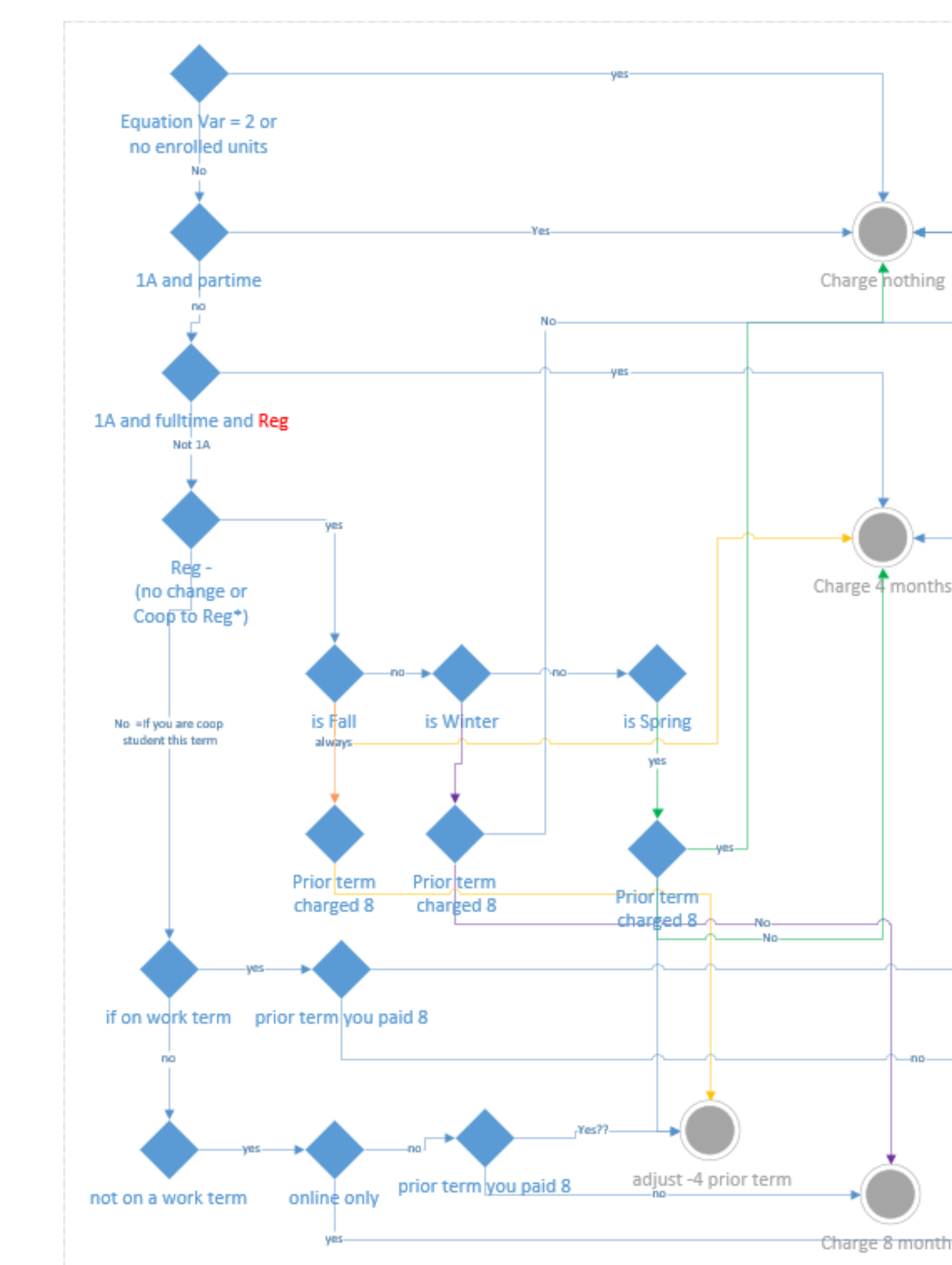
COVID – Students are allow to opt out of UHIP if they are not in Country

New SFS Analyst and BSA hired and review of the process was initiated.

- Staff steps are all manual
- Process ran every 2 weeks to update because of manual processing
- 60% of one FTE



final requirement created which can be systematically created



Automated Assessment of UHIP

Students accounts updated daily vs only every 2 weeks

2 hours to accomplish work used to take 48 hours

Pivot to create opt-out process half way through the term.

Was able to mass update all students who opted out in one step

## Changes Never Stop

Winter 2021

Spring 2021

Fall 2021

Yes 3 year's of work given up for a even more streamlined approach

Winter 2022

Spring 2022

UHIP Optout Allowed

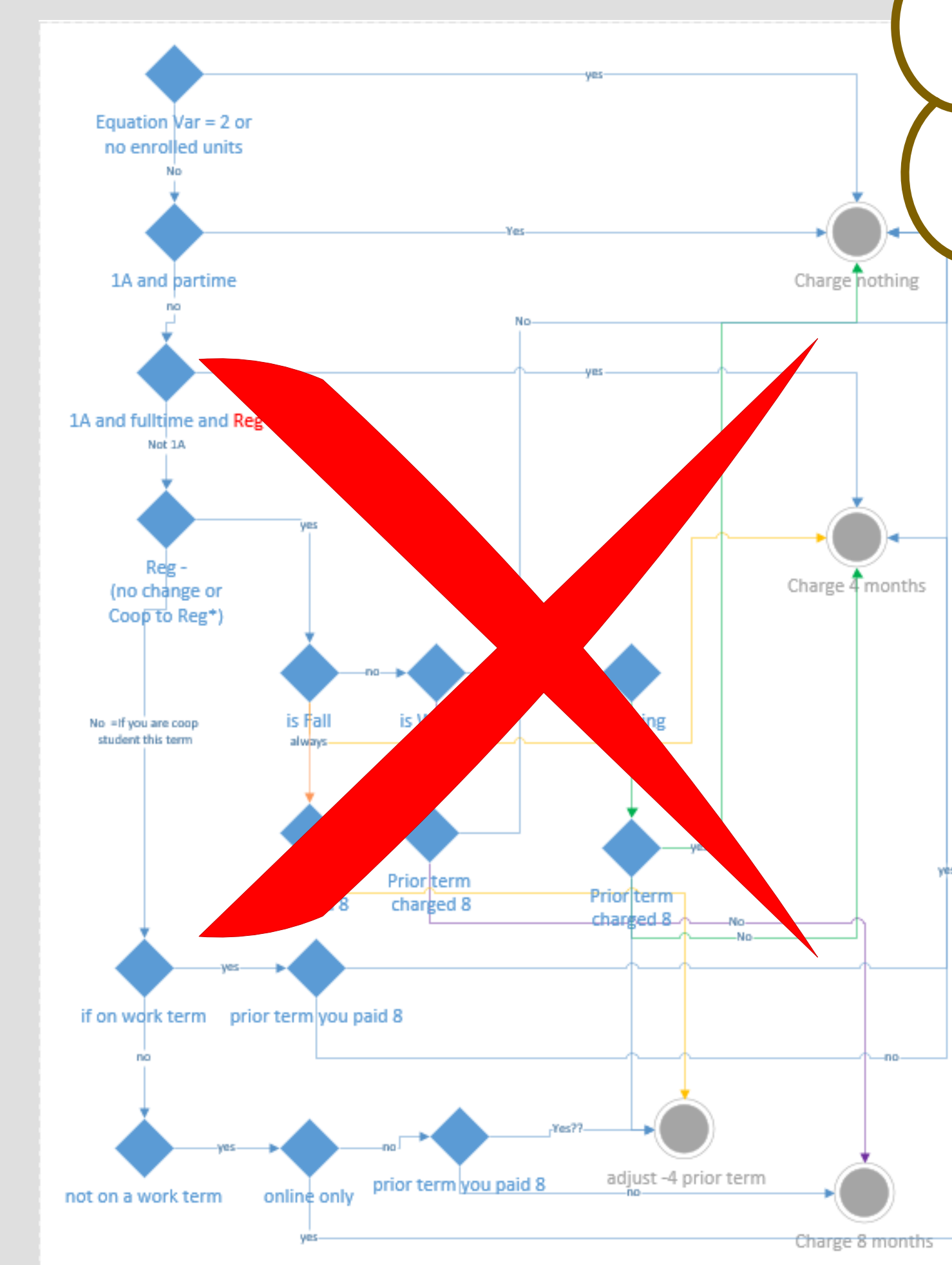
Policy change on how UHIP is charged for Fall 2021

Communication automated within Quest

Leveraged Student Choice Initiative to allow self-service opt out

Mass intervention required to close out policy year to align with new policy change

Completely changed how UHIP charge month is done and new logic and query created to determine how many months to charge.



Automated optional vs mandatory UHIP

Change how to determine first time at institution definition from 1A to looking at prior term enrollments



# How to build a canoe, while in the water: Campus Housing Enterprise System Renewal

## The Challenges:

- (2019-20)** Plan the transition from a custom-built system to a cloud-based vendor system while remaining operative in the current system for 2 Terms.
- (2020-2021)** Manage the transition from “situation normal” to pandemic response for a 5,800-bed student residence community.
- (2020-2022+)** Complete system/ process development and deploy training for a staff of 350+ while running day-to-day operations.

## Plan-Do-Check-Act

PDCA is a known concept and methodology in CI and Change Management circles. But it takes discipline and planning to make it an effective tool in day-to-day project rigour.

We use the PDCA method to:

- define scope
- set goals/expectations
- review outputs
- respond with corrective action(s)
- communicate out & receive business feedback.

We have 18 core team members and 10 project champions (points of contact).



www.create-learning.com



## Work Transparency

Campus Housing runs 3 x 15-minute meetings daily to identify and strategize issues being faced by business units. One (1) rep from each of 5 areas attends. The barriers are “scaled up” from front line, to management to executive level.

An issue log offers transparency /visibility to all levels in the department (via MS Teams).

We also utilize Jira tickets to log/assign/document work on the system.

The team benefits from strong project management. Our achilles heel is that we are a small project team.

## Process Renewal

System renewal became a catalyst opportunity for process simplification.

Process owners were encouraged to re-think their work because the old system had been heavily customized.

Process maps, gap analysis and requirements were used to identify key system &/or process functionality.

Process change is communicated through business “point people”. They also produce job aids, deliver training and act as a voice for their business unit.



# Web Conferencing Project

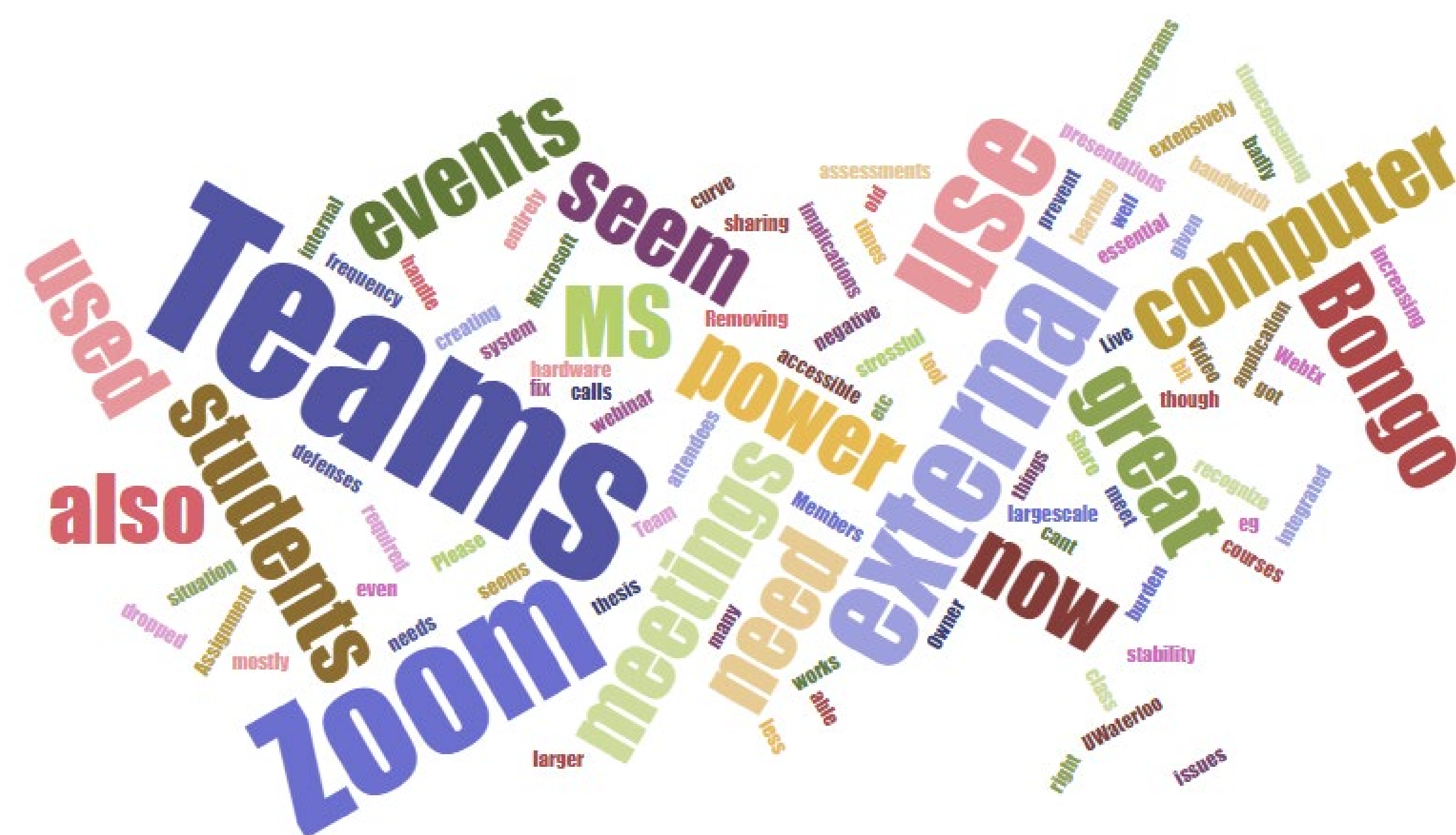
## The problem

The number of web conferencing platforms increased during the pandemic, resulting in:

- a lack of clarity about which are recommended for what uses
- a disparate set of documents and support models
- a lack of cohesion for our students who may use multiple platforms across courses

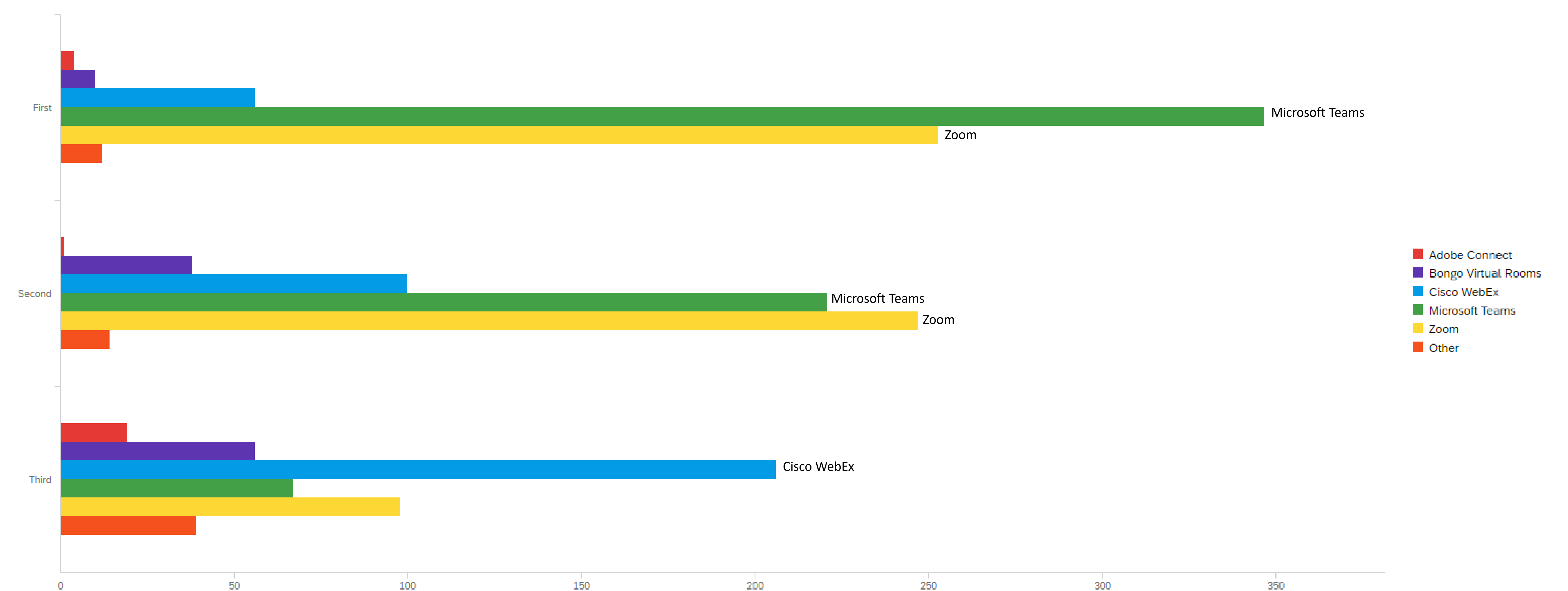
## The Solution

A project was initiated that rationalized the growing set of web conferencing platforms to a smaller, more supportable set. A project charter guided the team's efforts.



## Survey said...

Please rank the top three web conferencing platforms according to your preferences:



## What we did

We conducted three surveys.

1. Support Areas
2. Students
3. Faculty, staff and some grad. students

We received close to 1,000 responses in total.

## The result

Zoom and MS Teams were selected to continue being used.

Adobe connect will be discontinued and Cisco WebEx was selected to be used in a limited capacity for now.

Bongo Virtual Rooms will still be available because it is paired with Video Assignments, which is well used.

## The CI component

We rationalized and improved upon our web conferencing offerings to reduce waste and confusion and increase user satisfaction.

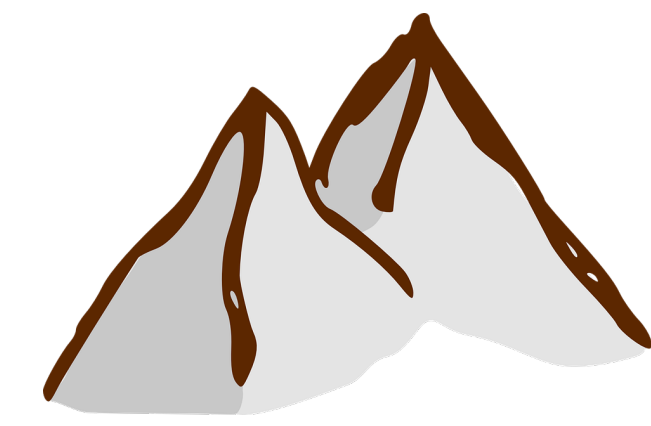
## How long did it take

2 months from start to finish for a team of 10 people.

# Information Systems: From a Project Request to RFP Preparation

## Continuous Improvement: A Project Manager's View

### The Challenge



A department on campus requests support to implement a new information system and requests project lead support from the Project Management Office.

How do we manage a complex process and balance engagement, expediency and quality? If we manage this process well, we see positive outcomes:

- Identify the right requirements
- Engage the right stakeholders
- Attract the right vendors to respond to the RFP
- Get to the implementation phase with the right amount of time

### The Stakeholders

Who are the stakeholders in this process?

- Business client and management
  - Requirements
  - Approvals
- Information Systems & Technology
  - SSO
  - Integrations
  - Data management
- Procurement
- Security/Privacy
- Finance (Financial Systems Assessment Committee (FSAC))
- Change Management
- Accessibility (WCAG 2.0)
- Additional depending on the project



### The Tools / Approach

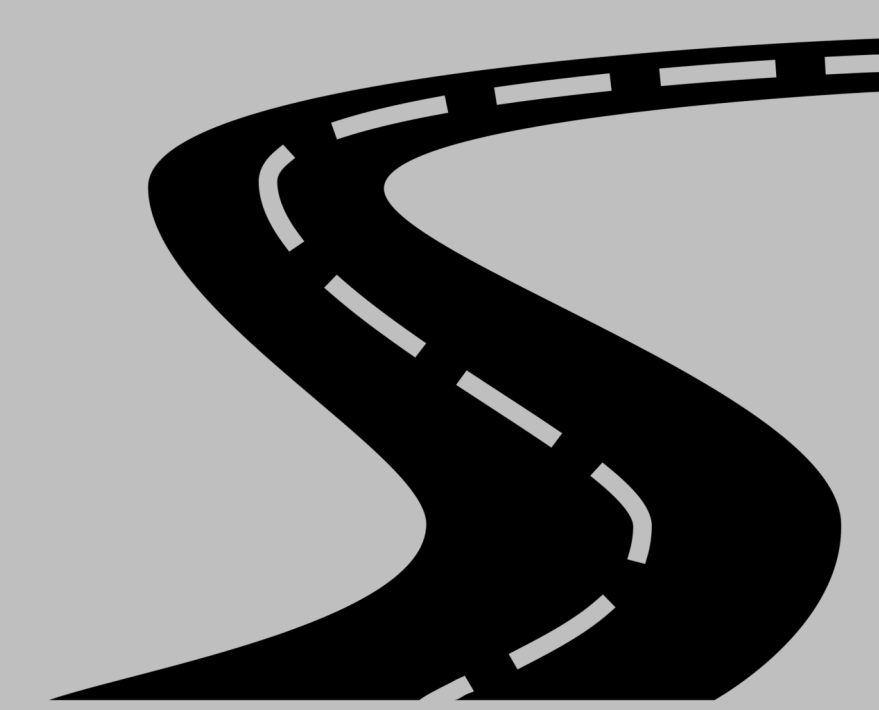
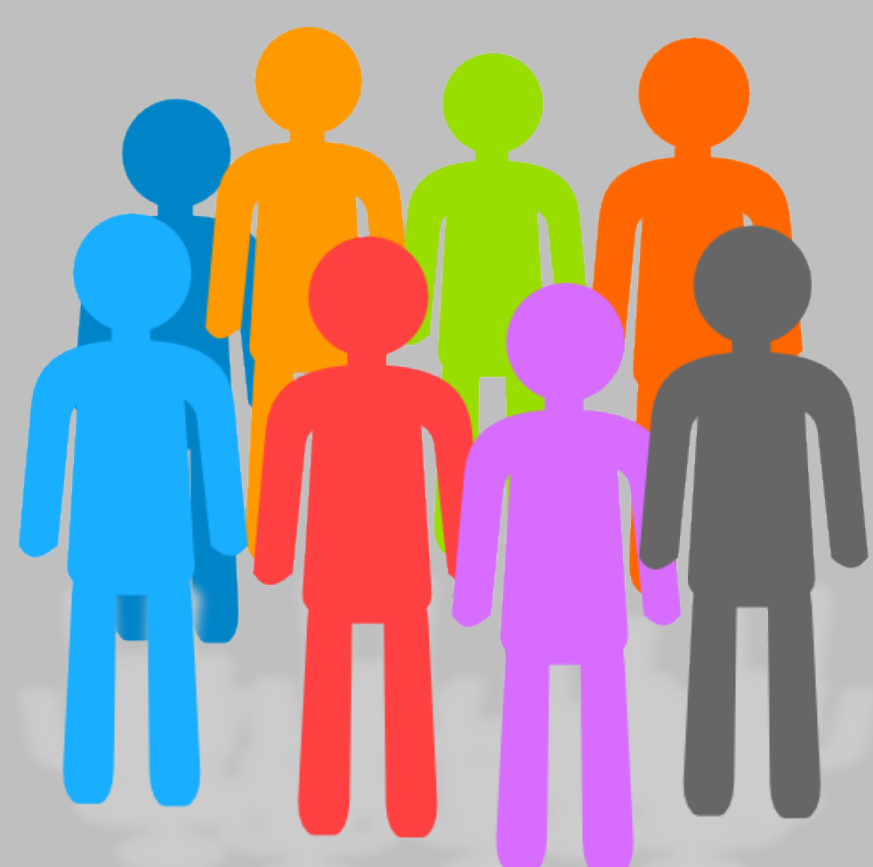
What do we use to help move from start to RFP?

- Project/Initiative Request form (UWaterloo Help Portal)
- RFI or general market research
- Project charter (Scope, Time, Cost)
- Planning software (Jira, MS Project)
- Business case
- Requirements documents
- Business process review
- Procurement documentation such as RFP written/demo requirements, bid table, statement of work
- Information Risk Assessment
- Change Management Assessment

### The Path Forward

Continuous Improvement Questions:

- Do we consider an environmental scan of what systems are currently on campus and how we can leverage these or collaborate?
- What stakeholders do we engage and when? Once we identify stakeholders, do we leverage a stakeholder register?
- We always use a project charter but should we also consider drafting a business case?
- How do we effectively obtain project approval (stage-gates to begin project; to post RFP etc.)?
- How do we communicate timelines to different stakeholder groups in order to 'sync' participation towards common goals?
- Do we inform procurement on our progress ongoing in building out procurement documentation?
- Do we consider a phased approach (two phase project approach (Phase 1: Project request to RFP and Phase 2: Contract signing to Go Live))



# ENHANCING CO-OP STUDENT HIRING PRACTICES

## Background

In March 2021, a small team of WIL Programs staff engaged in a review of its co-op student hiring processes with the goal of improving consistency and implementing equitable hiring practices.

Each term, our team of co-op supervisors:

- Screen 100+ candidates
- Conduct dozens of interviews
- Hire 20+ co-op students

These processes are complex and resource-intensive:

- 14 individual hiring processes, from job posting to job offer
- The coordination of a team of eight co-op supervisors and an administrative coordinator
- Several online tools and systems, including Teams and WaterlooWorks

## Using a Project Charter for a Small Project

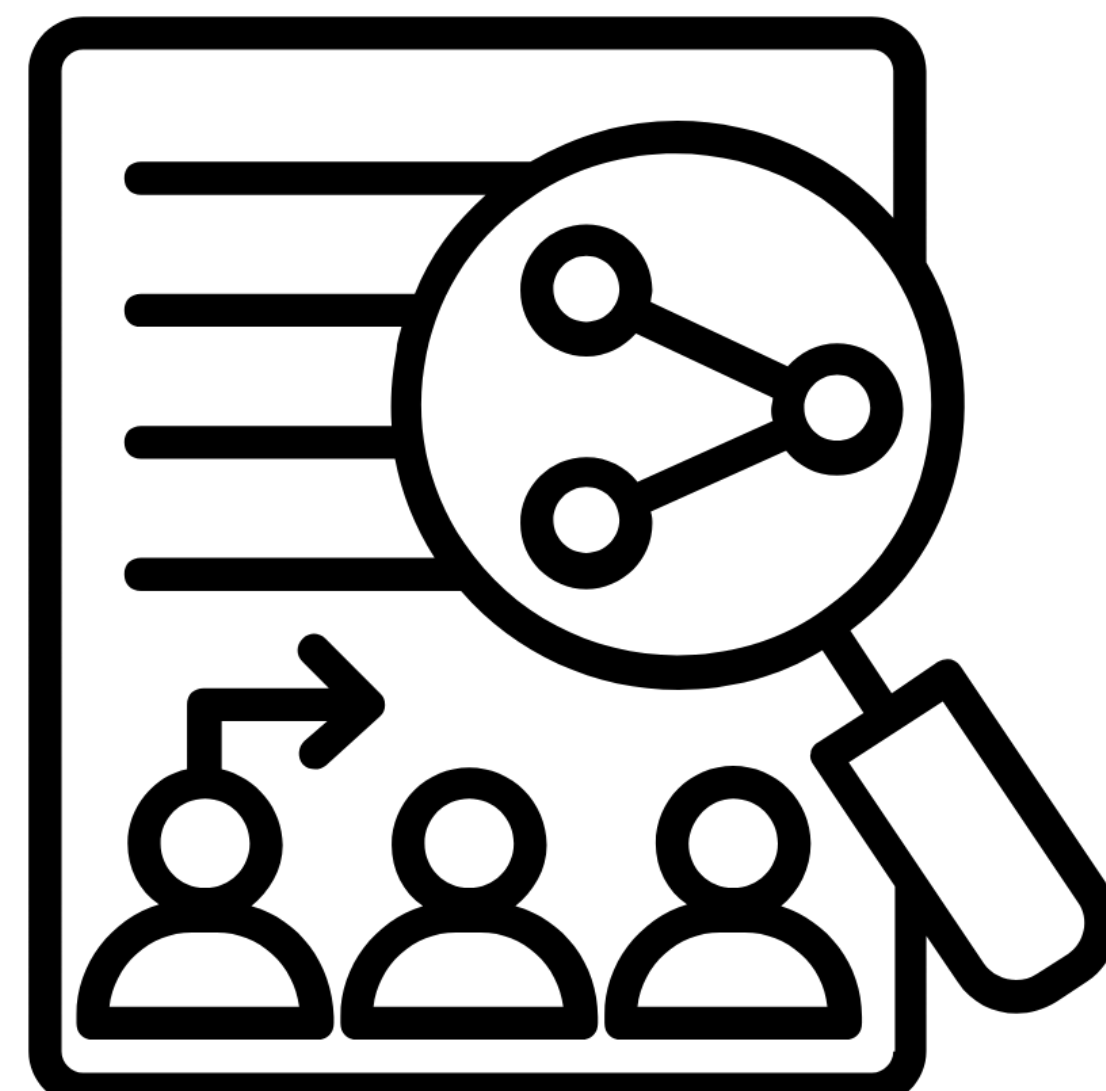
Our team adopted a project charter to support this project. As a small project, it had:

- A small team: 4 members
- A short timeline: 3 months
- Limited budget

This project had a few challenges including:

- Various priorities and a limited amount of time to accomplish our goals
- Numerous co-op hiring processes, each requiring attention
- Changes would affect numerous staff and co-op students in different ways

Although the project was small, using a project charter allowed our team to describe our **objectives**, identify the **scope**, and **manage the change**, resulting in more robust, consistent, and inclusive hiring processes.



## Objectives

Enable understanding of what the project will achieve.

### Our objectives:

- Align hiring, screening, assessments, and related processes with the fundamental requirements of the job
- Review our hiring practices with an equity and inclusivity lens

## Scope

Identifies the relevant deliverables and clarifies what the team and stakeholders should (and should not) expect from the project.

### In scope:

- Rewrite job description
- Update screening process
- Enhance group information session
- Revise interview questions, written assessment, and rubrics
- Streamline ranking meeting

### Out of scope:

- WaterlooWorks processes
- Permanent staff hiring practices

## Change Management

### Stakeholders List

Key people that could be affected by project activities and deliverables.

### Our stakeholders

- Co-op supervisors, co-op students, administrative coordinator, and others

### Communication Plan

Details how important information will be shared with and received from stakeholders, keeping them updated and enabling them to provide feedback.

### Our communication plan

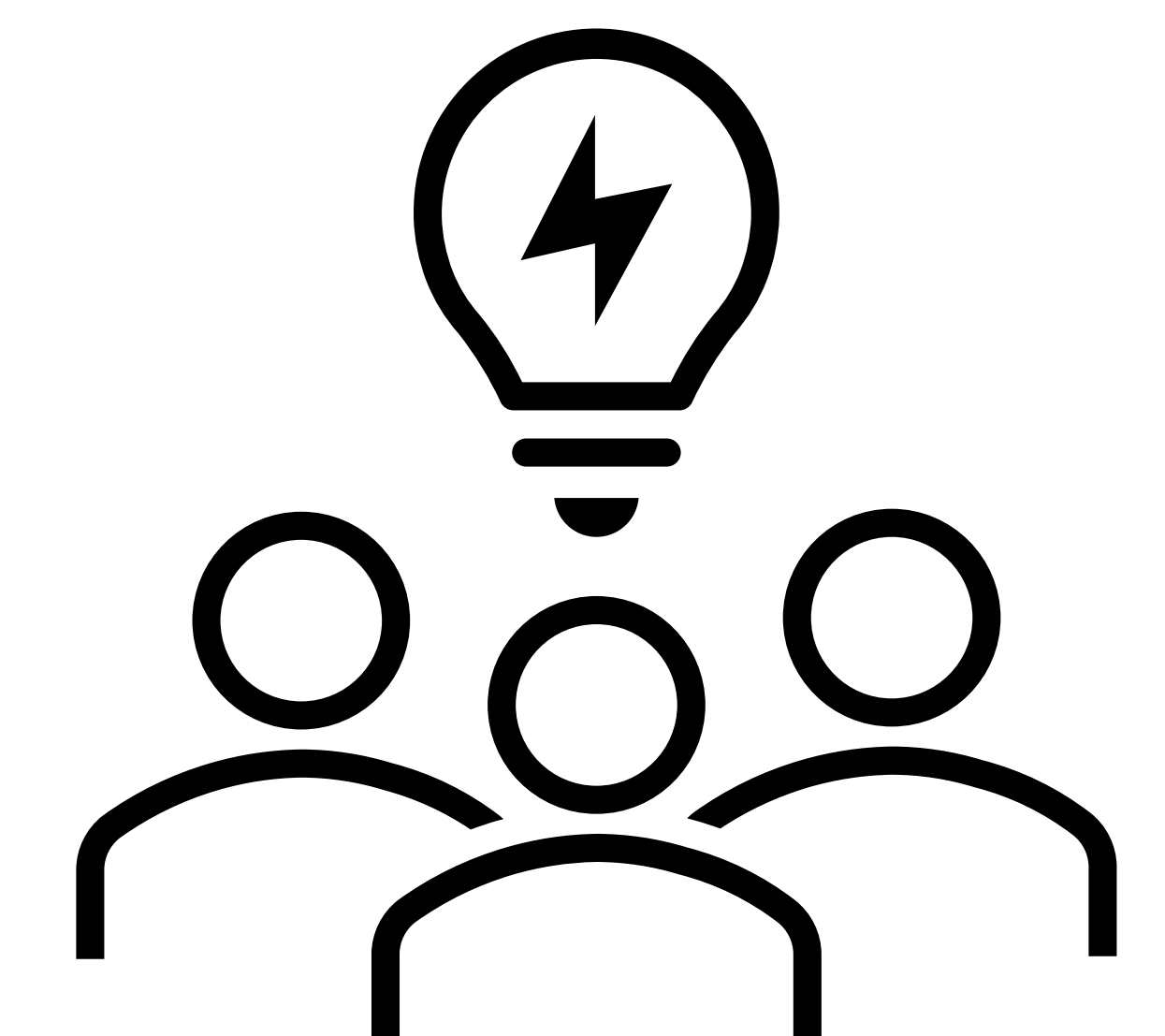
- Survey staff for baseline information
- Schedule input and feedback sessions
- Provide staff meeting project updates

### Training Plan

A plan to support those who will contribute to your change becoming permanent. Identifies who will need training, how and when they will receive training, and key messages.

### Our training plan

- Create written instructions
- Presentation of new documentation and processes to affected stakeholders



# FINANCE

## Improving customer service, end-user experience, and operational efficiencies

### Efficiencies

#### Revenue

Our Revenue Team wanted to achieve more from this initiative than a simple platform transfer and was ultimately successful at not only transitioning from SharePoint on premises to SharePoint Online, but also implementing significant workflow improvements by leveraging the capabilities of MS Power Automate.

#### Payments

Our Payments & Expenses team has automated several processes that were previously manual and reliant on hardcopy submissions:

- Undergrad students, visitors, and contract employees with contracts <3 months can now submit expense reimbursement forms electronically.
- Cash advance repayments and other reimbursements to the University are now done online via Shopify e-commerce.
- Automation of the Concur expense approval workflow.



### End user experience

We have automated several tools to provide the campus community with easier access to the information they need:

- Utilizing Finance Knowledge Base using Confluence, providing quick access to Finance information, training documentation, and answers to common questions.
- Using Decisions to automate the Concur and Unit4 new user onboarding process to quickly equip new employees with the resources they need to do their jobs (ongoing).
- Automation of the Correcting Journal Entry Forms (ongoing).
- FCM online self-bookings for travel.
- Requesting Certificates of Insurance now in SharePoint Online.
- Decommissioned on premises SharePoint site

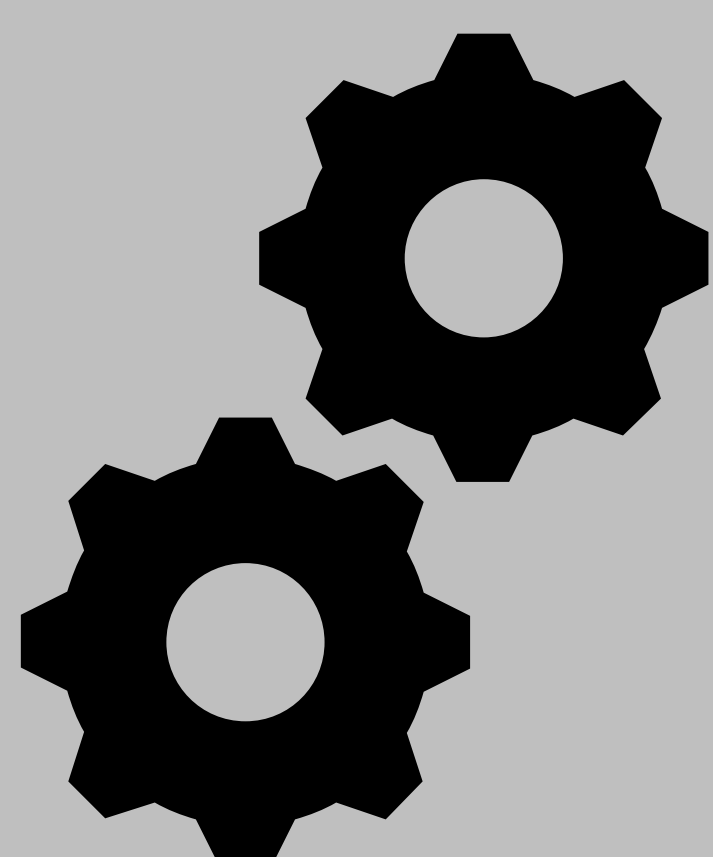
### Customer Service

#### Inquiries

- Implemented Jira Service Management (JSM) as our new online support tool, providing more transparency and faster triaging of help tickets compared to our previous Request Tracker (RT) system.
- JSM integrates with the new Finance Knowledge Base and suggests helpful Finance related how-to articles and manuals to help quickly resolve questions.

#### Reporting

- Utilizing Microsoft Power BI to combine financial data with information from Unit4 and other associated financial systems to improve both financial reporting and information presentation.
- Combining data security and advanced reporting capabilities in Unit4 to create formatted reports that provide users with information that was relevant to them, presented in a way that facilitates financial and budgetary analysis.



**Students:** <https://uwaterloo.ca/finance/>



**Faculty & Staff:** <https://uwaterloo.ca/finance-resources/>



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