UNIVERSITY OF WATERLOO

ORGANIZATIONAL & HUMAN DEVELOPMENT

CANADA AWARDS FOR EXCELLENCE

Excellence, Innovation and Wellness

Going for Silver

(Academic version)

Submission

October 4, 2016

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Profile

The University of Waterloo recognizes the benefits of lifelong learning. To support this value, Organizational & Human Development (OHD) was formed in 2006 as a non-academic support unit to design and deliver a wide range of personal and professional training and development opportunities for the campus community.

OHD offers workshops for staff and faculty on a variety of topics, from leadership and inclusivity to business communication. In addition, OHD can provide customized training solutions, working with clients to assess and address their learning and development needs.

Finally, OHD organizes an annual staff conference for the University of Waterloo. This two-day event brings engaging and informative keynotes to the campus and provides multiple in-house workshops from across the university.

Mission

Organizational & Human Development (OHD) 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.

Vision

To continuously improve the knowledge, skills, and abilities of all University of Waterloo employees to support exceptional service to our institution, our students, and our community.
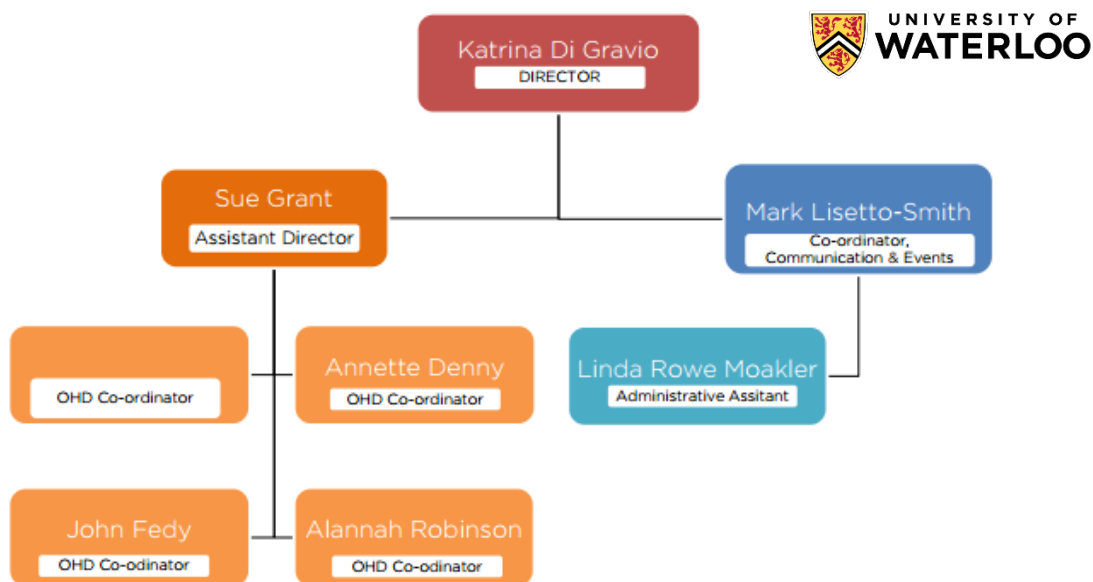
Our Goals

- Create a culture of continuous learning and development
- Be responsive to our community's learning needs
- Foster a respectful, inclusive, and healthy workplace where all are valued

Values

- Integrity
- Respect
- Wellness

- Inclusivity
- Lifelong Learning
- Courage

The organizational chart below highlights the staff in the Office along with the direct reports of the Director, Organizational & Human Development. The Office reports to and works very closely with the Associate Provost, Human Resources, and aligns our projects and work to the strategic plan of the university while focusing on the needs of our university community.

ORGANIZATIONAL & HUMAN DEVELOPMENT (OHD)
ORGANIZATIONAL CHART– July 2016

Katrina Di Gravio — DIRECTOR

UNIVERSITY OF WATERLOO

Sue Grant — Assistant Director

Mark Lisetto-Smith — Co-ordinator, Communication & Events

OHD Co-ordinator

Annette Denny — OHD Co-ordinator

Linda Rowe Moakler — Administrative Assitant

John Fedy — OHD Co-odinator

Alannah Robinson — OHD Co-odinator

Position Profiles

Director, Organizational & Human Development

Accountable for the development, implementation, operational effectiveness and administration of OHD programs and policies by providing comprehensive learning and development programs for Staff Faculty and Students. Responsible for contributing to the long term strategic direction of the overall University of Waterloo Human Resources plan. The Director establishes the direction and priorities for OHD Department, is responsible for the implementation and achievement of annual plans, responsible for creating and managing the strategic direction of OHD services to all areas across UWaterloo, ensures the effective utilization, deployment and development of people and capital resources, and Represents the University of Waterloo, from a OHD perspective, on various committees and groups.

Assistant-Director, Organizational & Human Development (no online job profile)

The Assistant Director, Organizational & Human Development contributes to OHD's support of the vision and mission of the University particularly as it applies to the Robust Employer strategic theme.

The Assistant Director contributes to the leadership of OHD through activities such as strategic planning, communication, staff management and development, collaboration, development and oversight of quality programs, measurement of effectiveness, project management, and reporting.

The Assistant Director is accountable for ensuring the smooth transition of information and present practice in the areas of learning, development, and training. Supporting the operational effectiveness and administration of OHD in general and more specifically advising in areas of expertise.

Coordinator, Communications & Events

The Coordinator, Communications & Events will work closely with the Director, Organizational & Human Development to operate the marketing, communications, and events of the department. The Coordinator, Marketing & Events must have the foresight to recommend progressive improvements and initiatives to keep the OHD marketing strategies and promotions fresh and competitive, while keeping the University branding in consideration as its base template.

The Coordinator, Communications & Events will develop and plan major learning and development events, such as the annual staff conference, and envision and articulate the

goals and objectives of the project, create clear project plans, manage cross-functional teams who contribute to the project, keep team leads on track, and collaborate with multiple project participants to ensure a successful outcome. Further, the Coordinator, Communication & Events is responsible for the financial management of the department.

OHD Coordinators (workshop developers and facilitators)

Reporting to the Assistant Director of Organizational and Human Development (OHD), the OHD Coordinators are member of the OHD team responsible for the day-to-day activities in the areas of learning, training and development OHD provides to the campus community.

The Coordinators role is to provide learning and development opportunities for, staff and faculty by providing workshops, training sessions, and other various materials and initiatives. The Coordinators will research best practices, trends, and new initiatives in Learning and Development and is accountable for developing and implementing a plan that will enable the development of UWaterloo staff and faculty through building knowledge and capacity in organizational development. The Coordinators contributes to the strategies and plans of the OHD department and builds relationships and partners with individuals and departments at various levels across the University community.

Administrative Assistant

The Administrative Assistant is responsible to provide the administrative support to the Office of Organizational and Human Development (OHD) and its programs, including (but not limited to) Staff Learning & Development workshops, The Academic Leadership Program (ALP), as well as supporting OHD events. The Administrative Assistant handles all matters regarding the registration and tracking of UWaterloo employees engaged in workshops and events provided the OHD department.

Our Journey

Organizational & Human Development's origin began as a Training & Development subgroup of the Human Resources (HR) department, providing training on key topics, such as leadership and communication. As the University of Waterloo evolved, so too did the needs of the employees and the requests for more development opportunities – particularly for managers and supervisors. It became evident that UWaterloo needed a far more comprehensive and dedicated development organization than it had been able to offer. The University announced that a new department would be created to provide training opportunities for staff, faculty, and students to achieve their learning and development goals. Partly in response to this objective, the Staff Relations Committee added a new clause to Policy 18, which gave staff a minimum suggested time-based allotment annually for

training and development programs (currently 35 hours/5 days per annum). Organizational & Human Development officially launched in November 2006.

Over the past decade, OHD has created several successful programs, such as our introductory Core Development series, our immersive Leadership Development Framework programs, and the award-winning Principles of Inclusivity series (Silver Award for Facilitated programming, Institute for Performance and Learning, November 2015). In April 2008, OHD launched the annual staff conference, a two-day event that features world-class keynotes as well as workshops (designed by campus employees) that help to develop personal and professional growth in our employees and further creates a robust, vibrant, and engaged community. This event has grown from 585 attendees initially to 1429 attendees in April 2016. OHD also created a 12-part Student Leadership Program that was launched in 2009. The program ran under the OHD banner until it was transitioned to a new, student-based department. This transition allowed the department to focus on new and changing needs for employee development and engagement.

In December 2015, OHD began its journey with Excellence Canada working with Nancy Collins internally and Catherine Neville from Excellence Canada as our Coach. We started with our internal survey and exploring common themes and areas of discrepancy. In March 2016, OHD meet as a team to discuss beginning the application submission for Silver Certification through Excellence Canada. At that time, we divided work into the main sections and discussed area of focus for interested individuals to work together as subgroups. In May 2016, OHD began meeting weekly to discuss the respective topics to begin laying the framework and documentation of supporting actions and evidence. Also, OHD agree to meet as a "Group of 7" every 2-3 weeks to review the project, the process, and address any needs or questions. In August, 2016, the respective subgroups met and scored our results, then we gathered as a full team and discussed the results for analysis and confirmation. The process of the silver submission has assisted OHD in confirming or identifying key strengths (such as Leadership and Service Excellence) as well as areas for improvement (Process and Project Management).

The scope of our application is agency-wide and your contact is

Nancy Collins

Strategic Initiatives Advisor | MC4051a
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200 University Ave. W., Waterloo, Ontario, N2L 3g1

The remainder of this submission will present what we have done to address the Standard, with supporting evidence.

1. Leadership and Governance

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a) The senior leadership team endorses and supports the following operating principles:
- **Leadership involvement**
- **A primary focus on relevant stakeholder experience**
- **Co-operation, teamwork, and continuous learning**
- **A focus on excellence, innovation and wellness**
- **A focus on continual improvement**
- **Commitment to fact-based decision-making through the use of data and measurement**
- **Commitment to corporate social responsibility**
- **Commitment to good governance, including enterprise risk management, and financial controls.**

Leadership provides clarity, sets direction, and provides an inspiring vision – be it in a project, an individual, or team.

Actions	Evidence (Appendices)
• All OHD Staff explored and developed the departmental Mission, Values, Values, and goals as a collaborative exercise. (Fall 2015) • Office developed a work plan for 2015-2018 in conjunction with the UWaterloo Strategic plan - Robust Employer-Employee Relationship theme o Further, OHD aligned our activities and priorities with priorities within the Robust Employer-Employee relationship theme. • Work plan is reviewed 3 times a year at our OHD retreats and team meetings	• *Mission Vision Values Post-Retreat Notes - July 2015.* • *OHD Work Plan – 2015-2018* • *OHD Priority alignment – 2016-17* • *OHD work supporting that Robust Employer-Employee relationship theme* • *Sample Meeting Agenda: March 2016 – Section 5: OHD's Progress on Employer Employee Strategic Theme*
A primary focus on relevant stakeholder experience • OHD, in partnership with HR, offers monthly the onboarding session (Regular, Contract and CUPE [union] employees) • Each new staff hire at UWaterloo receives a general overview of the Core Development workshops at onboarding and all new employees are highly encouraged to complete the workshops within the first year of their onboarding experience. o Core Development Workshops: Principles of Leadership (OHD106); Principles of Inclusivity (OHD502); Exceptional Service (OHD301) and Integrity Matters (OHD120) for all staff of the University.	o *Overview: OHD Relevant Stakeholder experience* o *OHD Supporting HR Orientation Facilitation Schedule* o *Sample: Temporary Orientation Agenda – 2016* o *Core Development Orientation Handout - 2016* o *Ref: Core Development Webpage*

• Annual Staff Conference: Workshops are designed and operated by Waterloo staff through a call for proposals method.	• *Annual Staff Conference Website* *Example Call for Proposal document sent out to 2500+ staff employees at the University (and affiliated institutions) Fall 2015*
• **Cross Campus Focus Groups** o In fall 2015 and winter 2016, OHD hosted several focus groups from a wide-selection of employees to ascertain key needs and themes in requests.	• *Focus Group Report: Individual Leadership Program*
• **Leadership Forum -** A monthly meeting coordinated by OHD of non-academic management and leaders across campus as an avenue for relationship building, knowledge sharing, creating collaborative strategies, and communication.	o *Overview: OHD Relevant Stakeholder experience* – *See Section on Leadership Forum*
• Consultation with custom workshop organizers o Our custom workshop templates demonstrate our process development to handle specific client requests. Process used for team integration into the custom process of workshop development/ deployment.	• *Custom Workshop Process Documentation (7 Levels)* • *Needs Assessment Conversation /Meeting – Guiding Questions*
Co-operation, teamwork, and continuous learning • OHD provides posters and handouts on Basic Principles and The Principles of Inclusivity to the campus community. These documents demonstrate the values of our unit and how we work in cooperation with each other and our clients – and how the institutions expects campus colleagues to engage one another and our students.	• *Principles of Inclusivity handout* • *Basic Principles handout* • *OHD disseminates 250+ posters and handouts per principles set per annum.*
• OHD has implemented individual development plans for all of its employees to enable their continuous learning	• *Individual Development Plan Template*
• Continuous learning and growth of Coordinators is an expectation that is formally supported and rewarded through a Career Path progression with promotion through the ranks.	• *OHD Career Path Document*
• Workshop development o OHD staff collectively design and develop workshop content on a variety of topics.	• *OHD Learning & Development* *Calendar of program and subjects*
• OHD Committee work • Honorary Member of the University Committee	• *The **Honorary Member of the University** designation is the*

	highest honour a staff member can attain at the University of Waterloo. It recognizes the individual for outstanding service to the university as a whole.
• [Provost's Advisory Committee on Equity (**PACE**)](#)	• *The **PACE** committee is advisory to the Vice President, Academic & Provost. The mandate of the committee is to provide a forum for consultation on equity.*
• Healthy Workplace Steering Committee	• *The **Healthy Workplace Steering Committee** will ensure the establishment, maintenance and evaluation of a Healthy Workplace Plan for the University of Waterloo.*
• Leadership Forum	• *[Overview: OHD Relevant Stakeholder experience](#) – See Section on Leadership Forum*

• **Shared Learning Experiences**: A shared learning strategy creates an environment of learning through sharing experiences, events, as well as formal training/individual areas of focus. It can create a common awareness of an individual's learning and celebrate their goals or accomplishments collectively. Shared events help strength team dynamics, help forge relationships, thus make work more meaningful and more productive	• *[Sample Team Sharing of learning agenda](#)*
	
	 • *[Formalized Development Resource Sharing Series](#)*
	
	 • *Sample Events We Attend Collectively*
	    o *[LeaderCast](#) Event*
	    o *[TEDx Waterloo](#) Even*
	    o *[Art of Leadership](#) Event*

• Staff International Experience Fund (SIEF) participation [Staff International Experience Fund](#) is an incredible opportunity that allows staff members to partake in an international experience that will broaden their professional perspectives on a global scale. The fund provides the chance to travel and engage in collaborative work with a Waterloo partner of their choice. It supports international engagement of the university community, in line with Waterloo's goal of becoming one of the most internationalized universities in Canada.	• *[Sue Grant : SIEF interview](#)* o *[Full Interview questions](#) May 2016*

A focus on excellence, innovation & wellness

- Delivery of workshops on the 13 Factors of a Psychologically Safe Workplace. In collaboration with Occupational Health, OHD offers a workshop introducing the factors and supporting materials to in explore elements that impact employees' psychological responses to work and work conditions/potentially causing psychological health problems.

- OHD includes mental health and wellness as part of our ongoing themes for the annual Staff Conference which includes speakers, workshops, presentations, and physical activities.

- OHD embeds wellness learning is embedded into our OHD workshop offerings:
  - Healthy Mind Platter
  - 5 Zones of Leading
  - De-escalation techniques

- OHD volunteered and partook in the Campus Wellness Walk(s)

- Greater KW Chamber of Commerce Business Excellence Award
  - Category: Engagement

- *Psychological Health and Safety in the Workplace*
  Over 480 employees have received psychological health and safety training and the training materials created at Waterloo will soon be available to other Canadian organizations. As the first higher-education institution to adopt the Standard, Waterloo has led the development of a community of practice that now includes 36 universities and colleges from across the country.

- *Examples of Staff Conference Health & Wellness Events*

- *Emotional Intelligence workshops offerings*
- *Success Through Mentorship*
- *Mental health First Aid certified*
- *Mindful Managers Training & Certification*

Waterloo wins employee engagement award – Feb 22, 2016
*Incorporating **the Principles of Inclusivity** into Waterloo's workplace culture through experiential workshops that raise awareness, deepen understanding, and set expectations relating to inclusive behaviours and skills in the workplace;*

*The implementation of the National Standard of Canada for **Psychological Health and Safety in the Workplace**: Waterloo is one of six organizations in Canada recognized by the Mental Health Commission of Canada as an early adopter of the program;*

*Annual conferences including the **OHD staff conference***

• OHD received the Silver Award, Canadian Awards of Training Excellence	*University of Waterloo wins national award for inclusivity program* – Nov 20, 2015 *The Institute of Performance and Learning awarded the Silver Award for Training Excellence to the Office of Organizational and Human Development for the Principles of Inclusivity program, a seven-part certificate program that develops and reinforces inclusive behaviours and skills.*

A focus on continual improvement
 	
• Custom workshop request process (sessions that are an intact group)– Groups want to use this opportunity to build partnerships with units and meet their performance needs and coach supporting managers on how to reinforce the skills and practices within the workplace
 	
• OHD builds in 100 day follow-up with several programs
    o Include one-on-one coaching and meeting within our Leadership offerings
 	
• OHD requests **evaluations** of all our programs and events (workshops, staff conference)
    o We are creating consistency of our post session evaluations by using a standard set of evaluation questions.
	• *Custom Workshop Process Documentation (7 Levels)*
	• *Needs Assessment Conversation /Meeting – Guiding Questions*
	
	• *OHD reviews **evaluations** and makes improvements on content, delivery and materials as suggested or makes note for group discussion on how changes or suggestions can be implemented for future offerings.*
	• *Staff Conference engages participants with a post conference survey to assess ideas for improvement.*
	• *Evaluation of every workshop post offering allows for our programming to be continuously improved.*

• OHD Director hosts and organizes the Leadership Forum	• *Overview: OHD Relevant Stakeholder experience – See Section on Leadership Forum. Feedback on UWaterloo Strategic Plan and forthcoming initiatives allows for continuous improvement.*
• OHD programing such as the Core Development workshops and our certificate series programs (Inclusivity, Business Communications) allow for continuous improvement for campus employees.	
• OHD has embedded a series of Core Competencies and Core Values	• *Built into to Leadership Development Framework for Employee Improvement*
• OHD assisted in hosting the first Canadian Lean in Higher Education Conference in September 2015 to introduce Lean ideas and its continuous improvement principles to the campus community.	• *https://uwaterloo.ca/lean-conference/*
Commitment to fact-based decision-making through the use of data and measurement	
• OHD requests **evaluations** of all our programs and events (workshops, staff conference)	• *OHD uses our **evaluations** to calculate interest (for number of workshop offerings per term) and to gauge on employee satisfaction.* • *We collect data on attendees to develop attendee profiles for the annual staff conference (manager vs, non-manager, years of service, etc.).* • *We collect all training and tracking data in MyHRinfo (a PeopleSoft program) to create employee training profiles and also use the data for measurement of workshops popularity and to gauge key indicators of the UWaterloo strategic dashboard*
• **Cross Campus Focus Groups** In fall 2015 and winter 2016, OHD hosted several focus groups from a wide-selection of employees to ascertain key needs and themes in requests.	• ***Focus Group Report**: Individual Leadership Program* *.*

Commitment to corporate social responsibility
 	
• Switching to water cooler as eco-solution instead of individual drinks thus reducing plastic consumption (i.e. Water bottles and Juice containers) for training room.
 	
• OHD participated in CanBuild event in collaboration with HR.
 	
• OHD provided training sessions for United Way volunteers for the UWaterloo campaign.
   • OHD volunteers and participates in the Treat-a-Gram program
 	
• OHD ran a series of workshops delivered to the St. Paul's GreenHouse
 	
• OHD was the UWaterloo rep for the National Commuter Challenge (2009-2012)
 	
• Public Education and outreach on the documentaries at the Annual Staff Conference:
   o Cola Road 2014
   o Salam Neighbor 2016
	• *CanBuild 2016 - all food collected by the University supports The Feds Student Food Bank and The Food Bank of Waterloo Region.*
	
	• *On-Campus University Wide fundraiser where treats purchased near Valentine's Day. Raised $13K for women in STEM (Science, Technology, Engineering and Mathematics)*
	• *St. Paul's GreenHouse is the first and only live-in campus-linked accelerator in Canada focused on social innovation and entrepreneurship.*
	• ***Cola Road** follows the launch of the first trial to use Coca-Cola's crates and distribution know-how to deliver life-saving anti-diarrhea kits.*
	• ***Salam Neighbor:** Two filmmakers fully embed themselves in a Syrian refugee camp, providing an intimate look at the world's most dire humanitarian crisis with follow-up discussion with the filmmakers.*

Commitment to good governance, including enterprise risk management, and financial controls. • OHD incorporates the key sections of UWaterloo's operational controls and resources as part of our Leadership Development Programs. • Office developed a work plan for 2015-2018 in conjunction with the UW Strat plan - Robust Employer-Employee Relationship theme	• *Invite University Secretariat and General counsel to present at the Leadership Essentials first session to present on governance and policy* • *Offering Resource Round table to the participants of the Leadership Essentials program to meet with University Resources and increase awareness and understanding.* • *Leadership Foundations brings in university Strategic Theme leads to meet with participants to discuss the UWaterloo Strategic plan.* • *OHD Work Plan – 2015-2018*

o Further, OHD aligned our activities and priorities with priorities within the Robust Employer-Employee relationship theme	• *OHD Priority alignment – 2016-17* • *OHD work supporting that Robust Employer-Employee relationship theme*
• We report to the Provost's Advisor Committee on Staff Compensation PACSC on our initiatives and finances received to support the annual staff conference.	• *Report to the Provost Advisory Committee on Staff Compensation (PACSC) June 9, 2016*
• OHD developed the workshop Integrity Matters in partnership with Integrity office.	• *Academic Integrity - University of Waterloo*
• OHD follows the Policies, Guidance and Procedures established by the Finance department for all our activities	• *The Finance Department: Policies, Guidance and Procedures*
• An Enterprise Risk Management for the University Secretariat has been completed by OHD Director	• *Risk Management Assessment* *(OHD)*

b) In the decision-making process, the university considers the wide-spread impact of decisions on students, employees and other stakeholders. Impacts include quality, safety, health and societal issues.

Organizational & Human Development is actively involved in partnership with several on-campus departments that support these subjects, including Occupational Health, Safety Office, Equity Office, and Conflict Management and Human Rights Office.

Actions	Evidence (Appendices)
Accessibility • OHD purchases **accessible furniture** for our training room. • Scent free training room space and encouraged scent free staff conference. As well, we remind our attendees to be considerate of other people's food allergies. • OHD will move or provide alternate locations for custom sessions to allow for accessibility. • OHD developed a One-on-One Principles of Inclusivity program for accessibility needs. **Safety** • OHD utilizes an information board to house official notices regarding Safety, Occupational Health, Employment Standards, etc., • University/Safety Office approved First aid kits and First aid trained staff member • OHD has a "work alone" office procedure to keep the doors locked and secured when alone to ensure safety. • OHD performs monthly safety inspections and maintains a log book as per Safety Office protocols **Quality** • OHD promotes best practices through posters to the campus • OHD disseminates 250+ posters and handouts per principles set per annum.	• *Purchase of our training room chairs included adjustable height, arms and no arms for comfort and safety.* • *OHD reviews ergonomic and safety when engaging in purchasing new furniture and equipment.* • *One-On-One Workbook Example created to support employees with group-engagement and public speaking anxieties.* • *Contains relevant first aid info, emergency protocols, safety protocols, employment standards, as well as wellness information.* • *UWaterloo: Work Alone Guidelines* • *The Basic Principles posters are mailed out and available to all of campus to promote collaborative behaviours when engaging in decision making and committee work.* • *Provide Posters of the Principles of Inclusivity to all of campus to promote inclusive behaviours when engaging in decision making and committee work.*

• OHD encourages staff to participate on University committees and act as departmental representatives as part of a quality assurance of our programs as well as promoting the values of the university.	• *OHD Committee work* • *Honorary Member of the University Committee* • *Provost's Advisory Committee on Equity (**PACE**)* • *Healthy Workplace Steering Committee* • *Leadership Forum* • *UWaterloo United Way Campaign* • *Sustainable Workplace Committee* *Previous:* • *Employee Assistance Program Committee (2011-2014)*

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c) There is a method to review and ensure compliance with relevant provincial and national legislation, regulations and standards, including human rights, privacy, health and safety, disability, accessibility, employment standards, etc.

The Secretariat & Office of General Counsel (SOGC) is responsible for supporting the University of Waterloo in its mission by providing guidance and professional legal support to University of Waterloo governing bodies, their committees and councils, and to senior University officers on all governance, policy and operational issues which might affect the institution. Organizational & Human Development, as a department of the University of Waterloo adheres to these strict guidelines.

Actions	**Evidence** (Appendices)
• All of OHD files are secure on a University network and an OHD R drive.	• *R:Drive Procedure Document*
• OHD ensures that their staff complete the necessary mandatory and compliance required training such as WHIMIS, AODA, Violence in the workplace, anti-spam legislation etc.). It is a part of our on-boarding of new staff, new coops and new interns. OHD checks annually that all required training is up to date.	• *Mandatory Training Link* (OHD Website)
• OHD provides leadership to campus in terms of Inclusive Behaviours through their offering of The Principles of Inclusivity Series.	• *Inclusivity Series* • *The Principles of Inclusivity*
• OHD completed the Job Hazard analysis as per the Safety Office's request.	• *Safety Office: Policies & Legislation*
• OHD participates in the workplace safety inspections and conducts a monthly self-audit.	
• OHD has a first aid kit and an employee trained in Standard First Aid.	
• OHD employees have participated in the "Intro to Web Accessibility" to ensure compliance of our web sites	• *IST Web Accessibility*
University	
• The Secretariat has an annual process for ensuring legislative compliance and outlining departmental responsibilities and accountabilities (e.g., Employment standards act, anti-spamming roll out). • The Privacy Officer resides in the Secretariat and provides university-wide support on privacy issues. • The University has developed a pandemic plan, which is regularly revised.	• *University Secretariat*

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- Waterloo has Joint Health and Safety Committees. Processes are in place to ensure compliance accountability (e.g., Health & Safety annual audit and course reminder).
- All Waterloo employees are required to take mandatory training on the topics of employee safety, workplace violence awareness, and accessible customer service.
- The Library has developed an AODA toolkit for all university units and employees, which includes a section on planning for inclusion.
- The Office of Research ensures that research conducted at Waterloo is ethical and upholds principles of research integrity. It also has a team of Research Financial Analysts and Training and Compliance Team members dedicated to assisting researchers with their accounts and financial obligations.
- AccessAbility Services provides support for students who have permanent or temporary disabilities. (e.g., alternate exam arrangements, delivery of materials). It also acts as a central access point for information and services related to accessibility at the university.
- All OHD staff have completed all mandatory training and promote the compliance of these training modules within our Leadership workshops.
- Lynda.com is an open on-line learning resource available to all employees.

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d) Governance framework policies applicable to the university's mandate and goals have been established, and such policies have been communicated across all areas.

University of Waterloo Governance framework policies applicable to Organizational & Human Development's operations have been established, and such policies have been communicated across all areas.

Actions	**Evidence** (Appendices)

OHD
 	
• New employees receive the onboarding workshop offered through HR and OHD.
    o Relevant Policies are identified and introduced to new employees.
    o Each new staff hire at UWaterloo receives a general overview of the Core Development workshops at onboarding and all new employees are highly encouraged to complete the workshops within the first year of their onboarding experience.
	• *Human Resources: Support For New Employees*
	• *Policy 18 – Staff Employment*
	
	• *Core Development Orientation Handout - 2016*
	• *Ref: Core Development Webpage*

• Signing authority is established in OHD as per University of Waterloo Financial regulations and policy.	• *The Finance Department: Policies, Guidance and Procedures*
• All of OHD files are secure on a University network and on the OHD departmental shared Drive (R:drive).	• *R:Drive Procedure Document*
• OHD ensures that their staff complete the necessary mandatory and compliance required training such as WHIMIS, AODA, Violence in the workplace, anti-spam legislation etc.). It is a part of our on-boarding of new staff, new coops and new interns. OHD checks annually that all required training is up to date.	• *Safety Office: Policies & Legislation*
• OHD provides leadership to campus in terms of Inclusive Behaviours through their offering of The Principles of Inclusivity Series.	• *The Principles of Inclusivity* • *Inclusivity Series* • *Basic Principles handout* • *OHD disseminates 250+ posters and handouts per principles set per annum.*
• OHD completed the Job Hazard analysis as per the Safety Office's request. • OHD has a first aid kit and an employee trained in Standard First Aid. OHD participates in the workplace safety inspections and conducts a monthly self-audit. • OHD employees have participated in Intro to web accessibility to ensure compliance of our web sites.	• *Safety Office: Policies & Legislation* • *IST Web Accessibility*

• In terms of communication across areas:
  • OHD has drafted an accountabilities checklist for participants within the Leadership Essentials Program to gain understanding of all policies, guidelines and accountabilities of person's in a supervisory role. This is a working document.
  • OHD has included within the Leadership Essentials and the Leadership Foundations programs a meeting between the participants and strategic theme leads of the University Strat Plan.
	• *General Accountabilities Checklist*
	
	• *OHD work supporting that Robust Employer-Employee relationship theme*

University • The Secretariat & Office of General Counsel oversees the process of policy development and renewal. This unit conducts a multi-year review of all university policies. • The University's Class A policies concern the appointment, promotion or removal of University academic administrative officers, including the President, Vice-President, Academic & Provost, Deans, Associate Deans, Chairs, Associate Chairs, Directors and Associate Directors of academic units. • The composition of the Board of Governors is prescribed by the UW Act. The Secretariat completes skills/gaps analysis of Board members when vacancies arise. The Board completes annual self-assessment. • The University has an internal audit plan and issues arising out of the audit are escalated to senior leadership. • Waterloo's strategic plan has been assessed with respect to risk	• *University Secretariat* • *Risk Management Reporting Guidelines* • *Risk Management Assessment* (OHD)

e) There is clear accountability and cascading of responsibility for excellence, innovation and wellness.

There is evidence of a clear cascade of responsibility throughout the management structure of Organizational & Human Development.

Actions	Evidence (Appendices)
• OHD has an organizational chart that outlines roles and how, as a team, we cascade directly from the Director, Organizational & Human Development. • OHD has Goals and Objectives that cascade to the goals and objectives of the University. • All OHD employees have performance goals for the year and are measured annuals upon those goals. • In our 2016 goals and objectives OHD strives to initiate and maintain a wellness plan with all staff participating.	• *Departmental Organizational Chart (July 2016)* • *OHD Goals: https://uwaterloo.ca/organizational-human-development/* • *OHD Priority alignment – 2016-17* • *OHD Work Plan – 2015-2018*

f) Indicators of effectiveness of leadership have been established and measured.

Organizational & Human Development follows university policies and procedures in regards to measuring performance, having open conversations with supervisors,

Actions	Evidence (Appendices)
• Each OHD employee has Annual Performance reviews • Each OHD employee has established workplace goals for the year which align with the goals and objectives of the department and tie to the strategic themes of the University. • OHD has developed a work plan that aligns with the University strategic plan. • OHD programs, such as the Principles of Inclusivity and the annual staff conference, are measured and evaluated in the University of Waterloo Strategic plan. • OHD collects all training and tracking data in the HRMS, MyHRinfo (a PeopleSoft program) to create employee training profiles and also use the data for measurement of workshops popularity and to gauge key indicators of the UWaterloo strategic dashboard	• *HR: Performance appraisal* • *OHD Priority alignment – 2016-17* • *OHD Work Plan – 2015-2018*

2. Strategy and Planning

<table>
<tr><td colspan="2">a) There is a vision, mission and/or values statement that has had input from key stakeholders. These statements are communicated broadly.</td></tr>
<tr><td colspan="2">Organizational & Human Development has developed a departmental Mission, Vision, & Values with input from all OHD Staff members.</td></tr>
<tr><td>Actions</td><td>Evidence (Appendices)</td></tr>
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• All OHD Staff explored and developed the departmental Mission, Values, Values, and goals as a collaborative exercise. (Fall 2015)
  o Input from the OHD team in both July 2015 and July 2016 has allowed for modification and evolution of our Mission, Vision, Values with our current activities and alignment with the University's strategic plan; in particular the Robust-Employer-Employee Theme.

• These statements are communicated broadly on the home page of our website and are featured in the print agenda of our annual staff conference.

• In addition to our Mission, Vision, Values, OHD provides posters and handouts on Basic Principles and The Principles of Inclusivity to the campus community. These documents demonstrate the values of our unit and how we work in cooperation with each other and our clients – and how the institutions expects campus colleagues to engage one another and our students.

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• *Mission Vision Values Post-Retreat Notes - July 2015.*

• *OHD communicates and reinforces mission, vision vales in our daily interactions.*

• *The Mission, Vision, and Values are reviewed annually to ensure relevance.*

• *Principles of Inclusivity handout*
• *Basic Principles handout*
• *OHD disseminates 250+ posters and handouts per principles set per annum.*

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b) A university-wide Strategic Plan has been developed and implemented with input from all stakeholders.

Organizational & Human Development supports the University-wide strategic plan through its programming and actions to the campus community.

Actions	Evidence (Appendices)
• The University of Waterloo has an institutional, multi-year strategic plan available for all to access. As stated below, there was broad input:	• *"Beginning in September 2011, more than 3,400 stakeholders including students, faculty, staff and alumni, shared their thoughts on where the University of Waterloo stood in global terms, and the challenges and opportunities that existed for the institution." Source: uwaterloo.ca*
• Office developed a work plan for 2015-2018 in conjunction with the UW Strat plan - Robust Employer-Employee Relationship theme o Further, OHD aligned our activities and priorities with priorities within the Robust Employer-Employee relationship theme	• *OHD Work Plan – 2015-2018* • *OHD Priority alignment – 2016-17* • *OHD work supporting that Robust Employer-Employee relationship theme*

c) **Flowing out of the Strategic Plan, a balanced set of key priorities and measurable goals has been developed that relate to excellence, innovation and wellness, as reflected in various plans. These are:**
- **Established with input from key stakeholders**
- **Determined for operating budget development and for inclusion in the university's operating plans**
- **Communicated across the university to build awareness.**

OHD works with the Associate Provost, Human Resources to align the work and key projects of our office to that of the institutional strategic plan.

Actions	Evidence (Appendices)

• The Office developed a work plan for 2015-2018 in conjunction with the UW Strat plan - Robust Employer-Employee Relationship theme
  o OHD has Goals and Objectives that cascade to the goals and objectives of the University.
 	
• Each OHD employee has established workplace goals for the year which align with the goals and objectives of the department and tie to the strategic themes of the University.
 	
• Within OHD's Leadership Essentials and Leadership Foundations programs. OHD has designed content in which the participants and their supporting managers engage with the Strategic Plan theme leads to have questions answered and to gain further clarification and connection with the various strategic themes.
 	
• OHD's operating budget is supplemented by on campus/University Grants to achieve its programming objectives, such as the annual staff conference
  o OHD reports to the Provost's Advisor Committee on Staff Compensation PACSC on our initiatives and finances received to support the annual staff conference.
• Each year OHD communicates new budgetary needs based on new initiatives to the institution administration.
 	
• Various methods are used to build awareness of OHD's goals and objectives which are communicated across the university.
	• *OHD Work Plan – 2015-2018*
	
	• *OHD Priority alignment – 2016-17*
	
	• *OHD work supporting that Robust Employer-Employee relationship theme*
	
	• *Report to the Provost Advisory Committee on Staff Compensation (PACSC) June 9, 2016*
	
	• *OHD Newsletter – a monthly e-communication used to promote and advertise OHD's programming and work.*
	• *OHD Website*
	• *YouTube videos to promote training and development to employees at the university*
	• OHD publishing within the *University Daily Bulletin*

	• *OHD Publications such as our workbooks and the annual staff conference agenda include materials.* • *Key OHD Data is published on the UWaterloo strategic dashboard to gauge key indicators.*

d) Baseline indicators to measure performance against goals have been established in plans (or sections of plans) and are monitored regularly through methods such as a "Balanced Scorecard" e.g.,

- **Stakeholder experience**
- **Governance and financial management**
- **Corporate Social Responsibility including energy management and environmental sustainability**
- **Enterprise risk management**
- **Continuous quality improvement, process and project management, and partner/supplier**
- **Innovation**
- **Knowledge Management and Information Technology**
- **Human Resources, Wellness and Mental Health.**

Organizational & Human Development has several performance measurements in place in regards to our strategically aligned programming and events as well as internally.

Actions	Evidence (Appendices)
- Employee annual goals and objective are established in conjunction with our annual performance review and monitored within our goals alignment document for progress 2-4 times per year. - All session participants are credited for their participation and monitored through myHRinfo (a PeopleSoft-based program). - OHD collects all training and tracking data in MyHRinfo to create employee training profiles and also use the data for measurement of workshops popularity and to gauge key indicators of the UWaterloo strategic dashboard - OHD programs, such as the Principles of Inclusivity and the annual staff conference attendance, are measured and evaluated in the University of Waterloo Strategic plan. - Financial statements are monitored monthly - Project codes have been established for key projects and programs to further monitor allocation of dollars. - Tracking ensures fiscal responsibility as well as identifying deficit or surplus areas. - Allows for Knowledge Management to ensure each OHD employee knows the current account/project codes.	*OHD Priority alignment – 2016-17* *OHD Work Plan – 2015-2018* *OHD work supporting that Robust Employer-Employee relationship theme* *Key Performance Indicators are measured and reported such as number of staff attending each workshop; attendance at our annual staff conference; participation in our leadership programs; cost of each program; level of satisfaction of each participant.* *Project Code/Accounting Flexfield Selection (What Account Should I Use?)*

• OHD requests evaluations of all our programs and events (workshops, staff conference)	• *OHD uses our evaluations a performance and measurement tool to gage knowledge transfer and understanding. These evaluations also operate as quality control and continuous improvement, valuable stakeholder feedback.*
• An Enterprise Risk Management for the University Secretariat has been completed by OHD Director	• *Risk Management Assessment (OHD)*
• OHD includes mental health and wellness as part of our ongoing themes for the annual Staff Conference which includes speakers, workshops, presentations, and physical activities.	• *Examples of Staff Conference Health & Wellness Events*
• Delivery of workshops on the 13 Factors of a Psychologically Safe Workplace. In collaboration with Occupational Health, OHD offers a workshop introducing the factors and supporting materials to in explore elements that impact employees' psychological responses to work and work conditions/potentially causing psychological health problems.	• *Psychological Health and Safety in the Workplace Over 480 employees have received psychological health and safety training and the training materials created at Waterloo will soon be available to other Canadian organizations. As the first higher-education institution to adopt the Standard, Waterloo has led the development of a community of practice that now includes 36 universities and colleges from across the country.*

• OHD embeds wellness learning is embedded into our OHD workshop offerings:
    o Healthy Mind Platter
    o 5 Zones of Leading
    o De-escalation techniques	

e) Enterprise risks have been identified.

University of Waterlo's Policy 11 – University Risk Management -provides the principles and framework for Risk assessment, monitoring and reporting under the University Risk Management program.

Actions	Evidence (Appendices)
• The institution has Management Policy/Guidelines in place through the Secretariat's office.	• *Policy 11 – University Risk Management Policy Risk Management Reporting Guideline*
• An Enterprise Risk Management for the University Secretariat has been completed by OHD Director	• *Risk Management Assessment (OHD)*
• Financial risk - Signing authorization levels in place, expenses closely monitored due to audit requirement • OHD follows the Policies, Guidance and Procedures established by the Finance department for all our activities	• *The Finance Department: Policies, Guidance and Procedures*

> **f) The university uses a variety of methods to communicate its various policies and plans.**

> OHD uses its own communication plans and strategies in conjunction with the communications methods of the institution to promote programming, plans, and new opportunities.

Actions	**Evidence** (Appendices)
• Various methods are used to build awareness of OHD's goals and objectives which are communicated across the university.	• *OHD Newsletter – a monthly e-communication used to promote and advertise OHD's programming and work.* • *OHD Website* • *YouTube videos to promote training and development to employees at the university* • *OHD publishing within the University Daily Bulletin* • *OHD Publications such as our workbooks and the annual staff conference agenda include materials.* • *Key OHD Data is published on the UWaterloo strategic dashboard to gauge key indicators.*
• The University of Waterloo's Policies, procedures and guidelines are on the Secretariat's website.	• *Secretariat and General Council – Policy, Procedures, and Guidelines.*
• Mini town halls to update campus on specific initiatives (throughout the year) • Annual Town Hall for all faculty, staff, students to update progress (Nov)	• *Mini Town Hall Sessions (Strategic plan)* • *President's Town Hall (President Office)*

3. Service Excellence

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a) Linked to the Strategic Plan, planning is in place that defines the service excellence, with a plan of how to deliver and measure the service.
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<td colspan="2">OHD created the benchmark Service Excellence standard for the University of Waterloo through the offering of the 'Exceptional Service' workshop.</td>
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<td>Actions</td>
<td>Evidence (Appendices)</td>
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- OHD created the benchmark Service Excellence standard for the University of Waterloo through the offering of the **Exceptional Service** workshop available to all employees, as well as imbedded in the on-boarding process within Human Resources, as part of the 'Core Development' program.
  - Departments and offices contact OHD to hold custom training of the Exceptional Service workshops for their unit.
  - Employees are directed to this program form managers and supervisors
- Each new staff hire at UWaterloo receives a general overview of the Core Development workshops at onboarding and all new employees are highly encouraged to complete the workshops within the first year of their onboarding experience.

- OHD provides a common and consistent message of Service Excellence throughout all programming.

- OHD works with on-campus partners to ensure programming meets the needs of their time-lines and requirements for opportunity and skill development.
  - Co-Operative Education & Career Action, which manages the co-operative education system and career-related services, plans their annual Business Meetings around the Staff Conference so off-campus staff can attend.

Internal Processes
- OHD monitors the programming available within other on-campus departments to ensure there is no overlap, and provides programming not offered by other institutional partners

- OHD provides opportunities to give feedback on programming, communication and design through pilot programs, focus groups and round table discussions.
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- *Sample: Temporary Orientation Agenda – 2016*

- *Core Development Orientation Handout - 2016*

- *Ref: Core Development Webpage*

- *Communication and building interpersonal relationships are the cornerstone of every workshop OHD delivers.*

- *Exceptional Service standards are thread into the delivery of all OHD workshops.*

- *Focus Group Report: Individual Leadership Program*
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• OHD has an established feedback process and uses this to monitor ongoing improvement of programming and delivery of service.	• *OHD uses our* evaluations *a performance and measurement tool to gauge knowledge transfer and understanding. These evaluations also operate as quality control and continuous improvement, valuable stakeholder feedback.* • *OHD follows up with individual responses where additional information or requests are expressed.* • *OHD uses the feedback provided from workshops and the Staff Conference to improve programs, events and scheduling.*

b) A service excellence policy exists and has been communicated clearly and consistently to students, employees and other stakeholders, as appropriate.

The University of Waterloo has adopted the Basic Principles to outline the University's philosophy on maintaining a constructive workplace through open and clear communication, and the institution created the Principles of Inclusivity to present the ideals by which campus members should engage one another – with respect, sensitivity, and fairness.

Actions	Evidence (Appendices)
• OHD is responsible for campus wide delivery, promotion and awareness/learning of the 'Basic Principles of The University of Waterloo' and the 'Principles of Inclusivity'.	• *Principles of Inclusivity handout* • *Basic Principles handout*

o These principles are supported through workshops as part of our Core Development series.
    Core Development Workshops:
    Principles of Leadership (OHD106); Principles of Inclusivity (OHD502); Exceptional Service (OHD301) and Integrity Matters (OHD120)
	o *Ref: Core Development Webpage*

o OHD, in partnership with HR, offers monthly the On-boarding session (Regular, Contract and CUPE) wherein the Core Development workshops are introduced.	o *OHD Supporting HR Orientation Facilitation Schedule*
o Each new staff hire at UWaterloo receives a general overview of the Core Development workshops at onboarding and all new employees are highly encouraged to complete the workshops within the first year of their onboarding experience.	o *Sample: Temporary Orientation Agenda – 2016* o *Core Development Orientation Handout - 2016*
• OHD promotes these best practices through posters given out to the campus • OHD disseminates 250+ posters and handouts per principles set per annum.	o *The Basic Principles posters are mailed out and available to all of campus to promote collaborative behaviours when engaging in decision making and committee work.* o *Provide Posters of the Principles of Inclusivity to all of campus to promote inclusive behaviours when engaging in decision making and committee work.*

c) Employees understand the importance of contributing to positive stakeholder service.

All OHD employees are actively engaged in programming and events that contribute to a positive stakeholder experiences and be responsive to our communities learning needs.

Actions	Evidence (Appendices)
• OHD schedules events & programming at various times to allow for flexibly of employee schedules. o Flexibility is shown to accommodate as many participants as possible and to accommodate the needs of many different participants and their particular workloads. • Availability and schedule of workshops and events are publicized well in advance (typically with a one year outlook), knowing that stakeholders need to be able to plan learning and development well in advance • Scent free training room space and encouraged scent free staff conference. As well, we remind our attendees to be considerate of other people's food allergies. • In response to frequent feedback, OHD altered the annual staff conference to incorporate a larger number of attendees.	• *OHD Learning & Development Calendar of program and subjects* • *Multiple sessions were offered to accommodate flexible schedules. Sample print agenda* • *OHD added an 'overflow' live-feed room for all Keynote Speakers at the Staff Conference to accommodate additional participants/attendees.* • *The event was moved to a new facility on campus in 2016 to allow more participants to attend, doubling the amount of attendees per workshop.* • *OHD offers a selection of evening sessions during the staff conference for night-time staff/employees.*

• OHD has developed a Custom Workshop Process to provide a consistency of service and to enhance learning and development opportunities for intact work teams; focusing on team building, conflict management, succession planning and more. o Custom request process (sessions that are an intact group)– Groups want to use this opportunity to build partnerships with units and meet their performance needs and coach supporting managers on how to reinforce the skills and practices within the workplace.	• *Custom Workshop Process Documentation (7 Levels* • *Needs Assessment Conversation /Meeting – Guiding Questions*
• OHD facilitators are trained to know and understand the learning styles and preferences of participants and to create an environment that is 'open, safe and welcome' for all participants. (House rules, group expectations, agenda, learning objectives and outcomes, and workshop goals etc.)	
• Workshops are set up in a way that are self-exploratory in nature, where participants have the ability to discuss thoughts and ideas and give input to the topic.	
• Many workshops are a series (Inclusivity, Leadership Essentials, Leadership Foundations, etc.) where facilitators have the opportunity to get to know participants and work with them to ensure successful transfer of learning into the work environment through changed/modified behaviours as a result of the training – follow-up e-mails, additional transitional learning and resources, one-on-one meetings, manager support meetings etc.	• *Leadership Development Framework: Leadership Essentials & Leadership Foundations (two immersive, multi module-based programs)* • *Principles of Inclusivity* program, a seven-part certificate program.
Stakeholder Involvement	
• OHD provides development opportunities for staff to assist in facilitating workshop (Inclusivity series), volunteers at the annual staff conference	
• The majority of Staff Conference workshops are presented by employees from the university, allowing opportunities and sharing of information across campus.	• *Example Staff Conference Call for Proposal document sent out to 2500+ staff employees at the University (and affiliated institutions) Fall 2015*
• Dietary needs, food allergies and a no-scent policy have been adopted in all OHD programming – Staff Conference, lunch meetings/programming, a reminder goes out to all workshop participants about allergies and no-scents	

d) Stakeholder requirements are identified, analyzed and communicated to employees.

OHD evaluates all Stakeholder requirements, such as learning competencies and requests to individual requirement and needs, and ensures facilitators are informed/aware of said needs.

Actions	Evidence (Appendices)
• OHD provides feedback opportunities – both internally and externally – for programs and events and monitors and reviews this feedback to embrace and implement necessary and timely changes to enhance programs and additional opportunities for employees. 　○ OHD hired a researcher to identify, analyze and determine the most efficient and effective way to solicit and collect feedback of stakeholders wants and needs.	• *OHD uses our evaluations a performance and measurement tool to gauge knowledge transfer and understanding. These evaluations also operate as quality control and continuous improvement, valuable stakeholder feedback.* • *OHD builds in 100 day follow-up with several programs* • *Include one-on-one coaching and meeting within our Leadership offerings*
• Accommodations are met for stakeholders who have self—identified as having a different need/learning style. 　○ OHD developed a One-on-One Principles of Inclusivity program for accessibility needs.	• *One-On-One Workbook Example created to support employees with group-engagement and public speaking anxieties.*
• OHD's Custom request process (sessions that are an intact group) has a Needs Assessment Conversation built into the process to identify requests/ to better determine the needs of stakeholders and then collaborate with them to deliver quality service.	• *Custom Workshop Process Documentation (7 Levels* • *Needs Assessment Conversation /Meeting – Guiding Questions*

e) Service standards exist at key contact points and are integrated into team or individual performance plans.

OHD implements several key service standards for our employee group.

Actions	Evidence (Appendices)
• OHD has developed internal service standards and expectations of service delivery and communication.	• *OHD Learning & Development Calendar of program and subjects*
• Availability and schedule of workshops and events are publicized well in advance (typically with a one year outlook), knowing that stakeholders need to be able to plan learning and development well in advance	• *Sample print agenda of the annual staff conference*
• The OHD website outlines procedures for registering for workshops and provides clear FAQ's for both Staff Conference and program information	• *OHD website: Workshops: How To Register* • *Staff Conference: Know Before You Go*
• Key processes, such as workshop enrollment and marketing/communications, are measured for effectiveness (example: communications against web traffic via Google Analytics) and are measured in the Annual Performance Goals, are targeted in the Individual Development Plan, and discussed in an ongoing basis	• *HR: Performance appraisal* • *Example: Google Analytics: OHD*
o Each OHD employee has Annual Performance reviews	• *Individual Development Plan Template*
o Each OHD employee has established workplace goals for the year which align with the goals and objectives of the department and tie to the strategic themes of the University.	• *OHD Priority alignment – 2016-17*
o OHD has implemented individual development plans for all of its employees that align to the department/university strategy.	• *OHD Work Plan – 2015-2018*
• Office developed a work plan for 2015-2018 in conjunction with the UWaterloo Strategic plan - Robust Employer-Employee Relationship theme	
• Our custom workshop templates demonstrate our process to handle specific client requests. These tools allow for reporting from key areas (initial contact, facilitator, follow-up, and administrative tracking	• *Custom Workshop Process Documentation (7 Levels)* • *Needs Assessment Conversation /Meeting – Guiding Questions*

f) Mechanisms are in place for stakeholders to:
- **Provide input on their requirements**
- **Seek assistance, and**
- **Give feedback on measures that are relevant to them.**

OHD communicates with stakeholders on a regular basis. Verbal feedback is always provided at the end of every workshop, along with the written workshop evaluation form. Data is tracked and evaluated.

Actions	Evidence (Appendices)
• OHD provides continual opportunity to solicit feedback from stakeholders – evaluation forms, survey monkey, focus groups, pilot groups etc. o We are creating consistency of our post session evaluations by using a standard set of evaluation questions.	• *OHD reviews **evaluations** and make improvements on content, delivery and materials as suggested or make note for group discussion on how changes or suggestions can be implemented for future offerings.* • *Staff Conference engages participants with a [post conference survey](#) to assess ideas for improvement.* • *[Evaluation](#) of every workshop post offering allows for our programming to be continuously improved.* • *OHD uses our **[evaluation](#)**s to calculate interest (for number of workshop offerings per term) and to gauge on employee satisfaction.* • *We [collect data on attendees](#) to develop attendee profiles for the annual staff conference (manager vs, non-manager, years of service, etc.).* • *We collect all training and tracking data in MyHRinfo (a PeopleSoft program) to create employee training profiles and also use the data for measurement of workshops popularity and to gauge key indicators of the [UWaterloo strategic dashboard](#)*

• OHD liaises with partnering departments to ensure consistency of service delivery and to discuss roles and responsibilities across departments, so that all departments involved know and understand who to direct stakeholders to as needed.
 	
• Accommodations are met for stakeholders who have self—identified as having a different need/learning style.
     o Example: OHD developed a One-on-One Principles of Inclusivity program for accessibility needs
 	
• OHD provides feedback opportunities – both internally and externally – for programs and events and monitors and reviews this feedback to embrace and implement necessary and timely changes to enhance programs and additional opportunities for employees.
     o OHD hired a researcher to identify, analyze and determine the most efficient and effective way to solicit and collect feedback of stakeholders wants and needs.
	• *[One-On-One Workbook Example](#) created to support employees with group-engagement and public speaking anxieties.*
	
	• *OHD uses our [evaluations](#) a performance and measurement tool to gauge knowledge transfer and understanding. These evaluations also operate as quality control and continuous improvement, valuable stakeholder feedback.*
	
	• *OHD builds in 100 day follow-up with several programs*
	
	• *Include [one-on-one](#) coaching and meeting within our [Leadership](#) offerings*

g) Baseline feedback measures have been identified. Results have been collected, and used to inform planning and innovation.

OHD collects key data on baseline measurements for the University of Waterloo Strategic Plan, which is then evaluated and used as a measurement.

Actions	**Evidence** (Appendices)
• OHD has implemented a system for inputting workshop evaluation data on a regular basis to analyze results against benchmark standards, and feedback annually from year to year.	• *OHD uses our **evaluations** to calculate interest (for number of workshop offerings per term) and to gauge on employee satisfaction. OHD uses **evaluations** to make improvements on content, delivery, and materials.*
	• *We collect all training and tracking data in MyHRinfo (a PeopleSoft program) to create employee training profiles and also use the data for measurement of workshops popularity and to gauge key indicators of the UWaterloo strategic dashboard*
• OHD has a baseline feedback mechanism for conferences and uses this information to make changes to service delivery in future, as well as to determine what participants are looking for in future conferences.	• *We collect data on attendees to develop attendee profiles for the annual staff conference (manager vs, non-manager, years of service, etc.).*
	• *Key Performance Indicators are measured and reported such as number of staff attending each workshop; attendance at our annual staff conference; participation in our leadership programs; cost of each program; level of satisfaction of each participant.*
	• *Staff Conference engages participants with a post conference survey to assess ideas for improvement.*

- Cross Campus Focus Groups - In fall 2015 and winter 2016, OHD hosted several focus groups from a wide-selection of employees to ascertain key needs and themes in requests. - Internally, OHD staff meet on a regular basis to discuss and celebrate successes as well as dedicated time to discuss issues and scenarios that require team input.	*Focus Group Report: Individual Leadership Program* *OHD uses information gained through focus groups and pilot groups to determine next steps of current programming and future design and development of new programming.*

4. People Engagement

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a) A strategic Human Resources Plan and a Wellness Plan, which includes mental health, are in place and clearly link to the overall Strategic Plan and related operational plans.

The University of Waterloo has implemented an eight-part strategic theme that includes the *Robust Employer-Employee Relationship* (being an exemplary employer) and *Promoting a Sound Value System* (which focuses on integrity, equity, diversity, and a balanced life).

Action	**Evidence** (Appendices)

• OHD has career paths for the OHD Coordinator role (workshop developers and facilitators) including details around evolution of role and responsibilities
 	
• OHD has a 2016-17 Priorities & Goals document that outlines details of objectives and goals as well as performance indicators. This document includes mention of developing a Wellness Plan and employee development plan. Further, OHD aligned our activities and priorities with priorities within the Robust Employer-Employee relationship theme.
   o Office developed a work plan for 2015-2018 in conjunction with the UWaterloo Strategic plan - Robust Employer-Employee Relationship theme
 	
• OHD employees take relevant training (e.g. Mentorship, facilitation) and have individual development plans. Individual Development plans tie into 2016-2017 Priorities and Goals document and University of Waterloo Strategic Plan.
   o OHD has implemented individual development plans for all of its employees that align to the department/university strategy.
 	
• OHD follows the University's recruitment and on-boarding process.
 	
• OHD developed a Human Resources Plan for the hiring and on-boarding of co-operative education students as well as new employees. This plan is in the infancy stage and just launched fall 2016.
 	
• OHD incorporates learning around health and safety, accessibility, inclusivity and mental health in programming developed and delivered to the campus community (Leadership Essentials, Leadership Foundations, Inclusivity Series, Psychological Health and Safety in the Workplace.
 	
• Absenteeism is tracked and documented by Supervisors/Managers (Director; Assistant Director; Coordinator, Communication & Events)
	• *OHD Career Path Document*
	
	• *OHD Priority alignment – 2016-17*
	
	• *OHD Work Plan – 2015-2018*
	
	• *Individual Development Plan Template*
	
	• *OHD Priority alignment – 2016-17*
	
	• *Uwaterloo: Human Resources Support for Hiring Managers*
	
	• *Co-Op Employee Manual*
	
	• Sample Vacation/Sick Day tracking Document

• OHD uses and follows the University's Flextime and Emergency Days policy.	• University of Waterloo Flextime Policy

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b) The leaders actively promote a culture of work/life balance.

Organizational & Human Development, as the institutional learning & development unit, supports a healthy culture of work/life balance with our client base and within our department. A focus on personal development time is also vital.

Action	**Evidence** (Appendices)
• OHD offers research time, each week, to allow for all employees to balance their workload.	• *Typically 3.5 hours per week.*
• OHD Management fully support OHD employees and their families. OHD adopts and individualizes this based on employee's needs.	
• Workload for the OHD Coordinators is monitored by the Director and Assistant Director. Workload for the Administrative Assistant is monitored by the Coordinator, Communication & Events. o Productivity measures are informally tracked for balance and succession.	• *Departmental Organizational Chart (July 2016)*
• OHD Managers track extra-hours and project workloads to ensure that employees take equivalent time off as compensation.	
• OHD has implemented individual development plans for all of its employees to enable their continuous learning	• *Individual Development Plan Template*
• Continuous learning and growth of Coordinators is an expectation that is formally supported and rewarded through a Career Path progression.	• *OHD Career Path Document*

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c) Human resources policies have been developed and are available to all employees for easy access. Human resources policies should address relevant human rights legislation and issues to protect against harassment and discrimination in the workplace, as well as inclusion and diversity.

The Secretariat & Office of General Counsel (SOGC) is responsible for supporting the University on all governance, policy and operational issues which might affect the institution, including Human Resource polices regarding human rights legislation.

Action	**Evidence** (Appendices)
- The Secretariat has a process for ensuring legislative compliance and outlining departmental responsibilities and accountabilities – specifically regarding to the Employment standards act, AODA, etc. - The Privacy Officer resides in the Secretariat and provides university-wide support on privacy issues. - The University has developed a pandemic plan, which is regularly revised. - Waterloo has Joint Health and Safety Committees. Processes are in place to ensure compliance accountability (e.g., Health & Safety annual audit and course reminder). - All Waterloo employees are required to take mandatory training on the topics of employee safety, workplace violence awareness, and accessible customer service. - The Library has developed an AODA toolkit for all university units and employees, which includes a section on planning for inclusion. - OHD ensures that their staff complete the necessary mandatory and compliance required training such as WHIMIS, AODA, Violence in the workplace, anti-spam legislation etc.). It is a part of our on-boarding of new staff, new coops and new interns. OHD checks annually that all required training is up to date.	*Office of the Secretariat: Policy 18*- *Staff Employment* - Policy 33: Ethical Behaviour - Policy 34: Health, Safety and Environment *Policy 76 - Faculty Appointments* *Policy 77- Tenure and Promotion of Faculty Members* *Mandatory Training Link (OHD Website)*

d) There is a system in place for recruitment, selection, and on-boarding of employees.

Human Resources (HR) provides the campus with support for Hiring Managers from departments and offices to ensure the recruitment/selection process is sound. HR provides regularity scheduled onboarding days/activities for new staff employees.

Action	Evidence (Appendices)
• Organizational & Human Development follows the policies and procedures of Human Resources in regards to recruitment, selection, and on-boarding.	• *Uwaterloo: Human Resources Support for Hiring Managers*
• OHD developed a Human Resources Plan for the hiring and on-boarding of co-operative education students as well as new employees. This plan is in the infancy stage and just launched fall 2016.	• *Co-Op Employee Manual*
• OHD, in partnership with HR, offers monthly the onboarding session (Regular, temporary, and CUPE[union] employees)	• *Overview: OHD Relevant Stakeholder experience* • *OHD Supporting HR Orientation Facilitation Schedule* • *Sample: Temporary Orientation Agenda – 2016*
• Each new staff hire at UWaterloo receives a general overview of OHD's Core Development workshops at onboarding and all new employees are highly encouraged to complete the workshops within the first year of their onboarding experience.	• *Core Development Orientation Handout - 2016* • *Ref: Core Development Webpage*

e) There is a system in place for the management of employee performance and retention, based on shared knowledge of roles and responsibilities as outlined in current position descriptions.

Organizational & Human Development aligns the department work and professional goals of the employees with the priorities of the University of Waterloo, which are measured for success/performance.

Action	Evidence (Appendices)

• OHD employees participate in an annual Performance Appraisal. The Performance Appraisal initiates goal setting, job performance, learning and development.
 	
• Performance is measured against identified goals and objectives is completed through Annual Performance Review.
 	
    o Each OHD employee has established workplace goals for the year which align with the goals and objectives of the department and tie to the strategic themes of the University.
    o All OHD employees have performance goals for the year and are measured annuals upon those goals.
 	
• OHD employees have regular goal setting and one-on-one meetings with their supporting manager.
 	
• OHD has implemented individual development plans for all of its employees to enable their continuous learning
 	
• Continuous learning and growth of Coordinators is an expectation that is formally supported and rewarded through a Career Path progression with promotion through the ranks.
	• *HR: Support for Employees: Compensation*
	
	• *HR: Performance appraisal*
	
	• *OHD Priority alignment – 2016-17*
	
	• *Individual Development Plan Template*
	
	• *OHD Career Path Document*

f) Training and development requirements are determined with employee input, and employees are assisted in acquiring and implementing new skills. Improving leadership, management, and supervisory interpersonal skills and abilities is a high priority.

Organizational & Human Development (OHD), as the institutional learning & development unit, provides solutions for new skill development, both professionally and personally. OHD supports the institution through immersive leadership programs for managers and supervisors.

Action	**Evidence** (Appendices)
• Many workshops are a series (Inclusivity, Leadership Essentials, Leadership Foundations, etc.) where facilitators have the opportunity to get to know participants and work with them to ensure successful transfer of learning into the work environment through changed/modified behaviours as a result of the training – follow-up e-mails, additional transitional learning and resources, one-on-one meetings, manager support meetings etc.	• *Principles of Inclusivity program, a seven-part certificate program.* • *Leadership Development Framework: Leadership Essentials & Leadership Foundations (two immersive, multi module-based programs)*
• OHD has waived any temporary/contract employee workshop fees to make learning and development more accessible on campus.	
• Within OHD's Leadership Essentials and Leadership Foundations programs. OHD has designed content in which the participants and their supporting managers engage with the Strategic Plan theme leads to have questions answered and to gain further clarification and connection with the various strategic themes. o OHD has included within the Leadership Essentials and the Leadership Foundations programs a meeting between the participants and strategic theme leads of the University Strat Plan.	• *OHD work supporting that Robust Employer-Employee relationship theme*
• OHD has drafted an accountabilities checklist for participants within the Leadership Essentials Program to gain understanding of all policies, guidelines and accountabilities of person's in a supervisory role. This is a working document.	• *General Accountabilities Checklist*
Employee Input	
• OHD provides development opportunities for staff to assist in facilitating workshop (Inclusivity series), volunteers at the annual staff conference • The majority of Staff Conference workshops are presented by employees from the university, allowing opportunities and sharing of information across campus	• *Example Staff Conference Call for Proposal document sent out to 2500+ staff employees at the University (and affiliated institutions) Fall 2015*

• OHD provides feedback opportunities – both internally and externally – for programs and events and monitors and reviews this feedback to embrace and implement necessary and timely changes to enhance programs and additional opportunities for employees. o OHD hired a researcher to identify, analyze and determine the most efficient and effective way to solicit and collect feedback of stakeholders wants and needs.	• *OHD uses our evaluations as a performance and measurement tool to gauge knowledge transfer and understanding. These evaluations also operate as quality control and continuous improvement, valuable stakeholder feedback.* • *OHD builds in 100 day follow-up with several programs* • *Include one-on-one coaching and meeting within our Leadership offerings*
• Accommodations are met for stakeholders who have self—identified as having a different need/learning style. o OHD developed a One-on-One Principles of Inclusivity program for accessibility needs.	• *One-On-One Workbook Example created to support employees with group-engagement and public speaking anxieties.*
• OHD's Custom request process (sessions that are an intact group) has a Needs Assessment Conversation built into the process to identify requests/ to better determine the needs of stakeholders and then collaborate with them to deliver quality service. • **Cross Campus Focus Groups** In fall 2015 and winter 2016, OHD hosted several focus groups from a wide-selection of employees to ascertain key needs and themes in requests.	• *Custom Workshop Process Documentation (7 Levels* • *Needs Assessment Conversation /Meeting – Guiding Questions* • ***Focus Group Report**: Individual Leadership Program*
• Internally, Each OHD employee has established workplace goals for the year which align with the goals and objectives of the department and tie to the strategic themes of the University. o OHD employee goals are reviewed and discussed with supporting manager to provide support and ensure priority alignment.	• *OHD Priority alignment – 2016-17* • *OHD Work Plan – 2015-2018* • *Individual Development Plan Template*

g) Human resources, wellness and Voice of the Employee indicators are developed, measured and communicated.

The University of Waterloo has several systems and organizations in place for the employees to provide communication/feedback/advocacy.

Action	Evidence (Appendices)
- Several groups support and advocate for the Voice of the Employee at the University of Waterloo, Including: **The Faculty Association** *The Faculty Association of the University of Waterloo (FAUW) is the official representative of all regular faculty members at the University of Waterloo.* **The Staff Association** *The University of Waterloo Staff Association (UWSA) is an independent, non-profit, democratic organization providing staff with a voice on university committees to influence decisions pertaining to working conditions, and to such agreements as benefits and compensation.* **CUPE Local 793** *Unionized staff members in the Food Services and Plant Operations departments are represented by the Canadian Union of Public Employees (CUPE) Local 793.* - Other avenues that act as the Voice of the Employee include (but are not limited to): **Town Halls:** **Presidential Town Hall** - Annual Town Hall (Nov) for all faculty, staff, students to receive a progress update and engage President Hamdullahpur and other senior administrators in a Q&A about campus priorities. **Mini Town Halls** - Waterloo host a special series of Mini Town Halls to learn what it will take to move Waterloo's eight strategic priorities from paper to practice. Hosted by President Hamdullahpur and other senior administrators	*Faculty Association* *Staff Association* *CUPE Local 793* - President's Town Hall - Waterloo Mini Town Halls Each Town Hall offers the opportunity to: - Ask questions about Waterloo's strategic priorities - Learn details of the action plans that support each strategic priority area - Hear from expert advisors and graduates committed to building a better university - Understand what the Strategic Plan means for you

o **Leadership Forum** - A monthly meeting of non-academic management and leaders across campus as an avenue for relationship building, knowledge sharing, creating collaborative strategies, and communication. The gathering also allows for feedback on UWaterloo Strategic Plan and forthcoming initiatives allows for continuous improvement. Internal: • Delivery of workshops on the 13 Factors of a Psychologically Safe Workplace. In collaboration with Occupational Health, OHD offers a workshop introducing the factors and supporting materials to in explore elements that impact employees' psychological responses to work and work conditions/potentially causing psychological health problems. • OHD includes mental health and wellness as part of our ongoing themes for the annual Staff Conference which includes speakers, workshops, presentations, and physical activities. • OHD embeds wellness learning is embedded into our OHD workshop offerings: o Healthy Mind Platter o 5 Zones of Leading o De-escalation techniques	• *Overview: OHD Relevant Stakeholder experience – See Section on Leadership Forum* • *Examples of Staff Conference Health & Wellness Events* • *Psychological Health and Safety in the Workplace Over 480 employees have received psychological health and safety training and the training materials created at Waterloo will soon be available to other Canadian organizations. As the first higher-education institution to adopt the Standard, Waterloo has led the development of a community of practice that now includes 36 universities and colleges from across the country.* • *Emotional Intelligence workshops offerings* • *Success Through Mentorship* • *Mental health First Aid certified* • *Mindful Managers Training & Certification*

h) Management provides various avenues for employees to provide feedback, and to put forward innovative ideas and suggestions for improvement.

Organizational & Human Development has more of a 'round-table' culture/structure than 'top-down' in our operational behaviour, providing a democratic approach to planning, communication, and feedback, while still respecting the organizational structure.

Action	Evidence (Appendices)
• All OHD Staff explored and developed the departmental Mission, Values, Values, and goals as a **collaborative exercise**. (Fall 2015) o **Input from the OHD team** in both July 2015 and July 2016 has allowed for modification and evolution of our Mission, Vision, Values with our current activities and alignment with the University's strategic plan; in particular the Robust-Employer-Employee Theme.	• *Mission Vision Values Post-Retreat Notes - July 2015*. • *OHD Work Plan – 2015-2018* • *OHD Priority alignment – 2016-17* • *OHD work supporting that Robust Employer-Employee relationship theme*

• Office developed a work plan for 2015-2018 in conjunction with the UWaterloo Strategic plan - Robust Employer-Employee Relationship theme
   o Further, OHD aligned our activities and priorities with priorities within the Robust Employer-Employee relationship theme.
   o **Work plan is reviewed 3 times a year at our OHD retreats and team meetings**
	• *Sample Meeting Agenda: March 2016 – Section 5: OHD's Progress on Employer Employee Strategic Theme*

• OHD has implemented **individual development plan**s for all of its employees to enable their continuous learning • Continuous learning and growth of Coordinators is an expectation that is formally supported and rewarded through a **Career Path** progression with promotion through the ranks.	• *Individual Development Plan Template* • *OHD Career Path Document*

• **Shared Learning Experiences**: A shared learning strategy creates an environment of learning through sharing experiences, events, as well as formal training/individual areas of focus. It can create a common awareness of an individual's learning and celebrate their goals or accomplishments collectively. Shared events help strength team dynamics, help forge relationships, thus make work more meaningful and more productive.	• *Sample Team Sharing of learning agenda*
	
	• *Formalized Development Resource Sharing Series*
	
	• *Sample Events We Attend Collectively*
	   o *LeaderCast Event*
	   o *TEDx Waterloo Event*
	   o *Art of Leadership Event*

• OHD requests internal evaluations post-event to assess ideas for improvement, and how said improvements or suggestions can be implemented for future offerings.	• *Example: Staff Conference Post-mortem survey*

5. Process and Project Management

a) Key processes and projects have been identified.

Organizational & Human Development has aligned our activities and priorities with priorities within the Robust Employer-Employee relationship theme of the University of Waterloo Strategic Plan. Thus, OHD's key processes, projects, goals and objectives cascade from the goals and objectives of the University.

Action	Evidence (Appendices)
• The Organizational & Human Development Office developed a work plan for 2015-2018 in conjunction with the UWaterloo Strategic plan - Robust Employer-Employee Relationship theme o Further, OHD aligned our activities and priorities with priorities within the Robust Employer-Employee relationship theme.	• *OHD Work Plan – 2015-2018* • *OHD Priority alignment – 2016-17* • *OHD work supporting that Robust Employer-Employee relationship theme*
• OHD promotes best practices through posters to the campus o OHD disseminates 250+ posters and handouts per principles set per annum.	• *The Basic Principles posters are mailed out and available to all of campus to promote collaborative behaviours when engaging in decision making and committee work.* • *Provide Posters of the Principles of Inclusivity to all of campus to promote inclusive behaviours when engaging in decision making and committee work.*

• Each new staff hire at UWaterloo receives a general overview of the Core Development workshops at onboarding and all new employees are highly encouraged to complete the workshops within the first year of their onboarding experience.
  o Core Development Workshops:
  Principles of Leadership (OHD106); Principles of Inclusivity (OHD502); Exceptional Service (OHD301) and Integrity Matters (OHD120) for all staff of the University.
 	
• Core Development workshop support the Universities Strategic Plan
  o Robust Employer-Employee Relationship
    ▪ Be a destination of choice for superior individuals seeking employment
	• *Core Development Orientation Handout - 2016*
	• *Ref: Core Development Webpage*

- ▪ Enable staff to fulfill their potential in a career at the university
  - o Sound Values
    - ▪ Promote Integrity as a core value
    - ▪ Provide an equitable and inclusive environment for students, faculty and staff
      - OHD developed the workshop Integrity Matters in partnership with Integrity office.
      - OHD received the Silver Award, Canadian Awards of Training Excellence

- Academic Integrity - University of Waterloo
- University of Waterloo wins national award for inclusivity program – Nov 20, 2015
  The Institute of Performance and Learning awarded the Silver Award for Training Excellence to the Office of Organizational and Human Development for the Principles of Inclusivity program, a seven-part certificate program that develops and reinforces inclusive behaviours and skills.

- OHD requests **evaluations** of all our programs and events (workshops, staff conference)

- *OHD uses our **evaluations** to calculate interest (for number of workshop offerings per term) and to gage on employee satisfaction.*
- *We collect data on attendees to develop attendee profiles for the annual staff conference (manager vs, non-manager, years of service, etc.).*
- *We collect all training and tracking data in MyHRinfo (a PeopleSoft program) to create employee training profiles and also use the data for measurement of workshops popularity and to gauge key indicators of the UWaterloo strategic dashboard*

b) A standardized method is in place for project management.

Organizational & Human Development (OHD) adopted a standard practice for all key/major projects, such as the Annual Staff Conference and our Custom Workshop Request.

Action	**Evidence** (Appendices)
• OHD utilizes a critical path document to track key steps in management of the annual staff conference, breaking down key roles, responsibilities, progress updates, etc.	• *Staff Conference Critical Path*
• A clear process for workshop enrolment and communication to participants and supporting managers. o Website includes instructions, cancellation policies o Registration takes place through HR software MyHRinfo where staff can see courses available, open seats, next sessions available, and self-enroll. o Employees and Supervisors receive an instant e-mail notification of the enrollment confirmation for their records and awareness	• *How to Register | Organizational & Human Development* • *Sample Enrollment Confirmation*
• Clear documentation is provided to prospective attendees of our in-depth/immersive programs so they are aware of the key steps in the application process, the nature of the programs, and what is expected of the participants and supporting manager.	• *Leadership Development Framework: Leadership Essentials & Leadership Foundations (two immersive, multi module-based programs)*
• OHD's Custom request process (sessions that are an intact group) has a Needs Assessment Conversation built into the process to identify requests/ to better determine the needs of stakeholders and then collaborate with them to deliver quality service.	• *Custom Workshop Process Documentation (7 Levels)* • *Needs Assessment Conversation /Meeting – Guiding Questions*
• A Marketing/Communications Strategy is in place to promote and advertise workshops, learning opportunities, and events to the campus community, including:	• *OHD Newsletter* – *a monthly e-communication used to promote and advertise OHD's programming and work.* • *YouTube videos to promote training and development to employees at the university* • *OHD publishing within the University Daily Bulletin* • *OHD Publications such as our workbooks and the annual staff conference agenda include materials.*

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c) Key work processes and/or procedures, including process ownership, are documented using a consistent methodology across the university, and are easily accessible by all employees.

Action	**Evidence** (Appendices)
• There is cross-functional training of all facilitators of our Core Development workshops.	• *2016-2017 Workshops* • *Final 2015-2016 Workshops*
• OHD utilizes a critical path document to track key steps in management of the annual staff conference, breaking down key roles, responsibilities, progress updates, etc.	• *Staff Conference Critical Path*
• OHD's Custom request process (sessions that are an intact group) has a Needs Assessment Conversation built into the process to identify requests/ to better determine the needs of stakeholders and then collaborate with them to deliver quality service.	• *Custom Workshop Process Documentation (7 Levels)* • *Needs Assessment Conversation /Meeting – Guiding Questions*
• Organizational & Human Development store all digital files on a university network 'cloud' server/drive (R:Drive). o Directories for key projects, workshop administration, operations, and research are stored here with the final/most-up-to-date version available for easy access.	• *R:Drive Procedure Document*

d) Training for process and project management and related tools is planned and/or underway for involved employees.

Organizational & Human Development (OHD) has cross-trained operational employees (non-facilitators) on key functions and processes. Facilitators provide expertise on effective facilitations training to clients/other units on campus.

Action	Evidence (Appendices)
• OHD has trained operational employees, Coordinator, Communication and Events and the Administrative Assist, on COGNOS and PeopleSoft to support department programs	

• OHD provides training in facilitation to other campus employees/units.
    o Established a consistent and common approach
    o understanding the characteristics of adult learners
    o Working with challenging behaviours, etc.
	• *OHD Facilitation Training write-up.*
	 • *Facilitator Certificate sample*

• OHD is considering project management training for Coordinator, Communication and Events for event/large scale project management	• *Forthcoming*

e) Key measures have been identified and data is actively being collected and used to measure and monitor key process stability.

Organizational & Human Development (OHD) actively measures and tracks employee development on campus for reporting purposes.

Action	Evidence (Appendices)
- OHD has 9+ years of extensive data collections from the annual staff conference, including for each workshop/session, as well as keynote and logistics feedback. - Feedback on workshop offerings which are reviewed to improve and align with learning needs - Logistics Feedback is used for continuous improvement/tracking - OHD receives reports from its in-depth leadership programs (Leadership Essentials, Leadership Foundations). - OHD contributes to data collected in the Robust Employer-Employee Relationship theme of the University of Waterloo Strategic plan. - OHD tracks attendance to the annual staff conference and compares data to Strategic Plan goals, such as attendance number increasing to 60% in 2018. - OHD achieved this goal in 2016 with 62% of staff attendance. - OHD requests **evaluations** of all our programs and events (workshops, staff conference)	*Sample Data collection from the Annual Staff Conference workshop.* *2016 Staff Conference Evaluation Survey* *Reports for Leadership Development Programs* *Key Performance Indicators are measured and reported such as number of staff attending each workshop; attendance at our annual staff conference; participation in our leadership programs; cost of each program; level of satisfaction of each participant.* *The event was moved to a new facility on campus in 2016 to allow more participants to attend, doubling the amount of attendees per workshop.* *OHD uses our **evaluations** to calculate interest (for number of workshop offerings per term) and to gauge on employee satisfaction.* *We collect data on attendees to develop attendee profiles for the annual staff conference (manager vs, non-manager, years of service, etc.).*

	We collect all training and tracking data in MyHRinfo (a PeopleSoft program) to create employee training profiles and also use the data for measurement of workshops popularity and to gauge key indicators of the UWaterloo strategic dashboard

f) Key internal stakeholders across all levels are involved in process improvement activities with demonstrated input from employees directly impacted by any changes.

Organizational & Human Development involves the team when planning process improvements, discussing and reviewing changes prior to commencement.

Action	Evidence (Appendices)

OHD
• Project codes have been established for key projects and programs to further monitor allocation of dollars. Operational employees worked on creating the codes and system to assist the team.
     o Tracking ensures fiscal responsibility as well as identifying deficit or surplus areas.
     o Allows for Knowledge Management to ensure each OHD employee knows the current account/project codes.
 	
• All staff were involved in the development of the procedure/manuals/process. All staff reviewed the initial procedures before implementation date. The owner of the procedure is directly involved in any changes in work processes.
	New Budget Codes for Tracking:
	• *Project Code/Accounting Flexfield Selection (What Account Should I Use?)*
	
	Key Procedures:
	• OHD developed a Human **Resources Plan for the hiring and on-boarding** of co-operative education students as well as new employees. This plan is in the infancy stage and just launched fall 2016.
	     o *Co-Op Employee Manual*
	
	• **Custom request process** (sessions that are an intact group)– Groups want to use this opportunity to build partnerships with units and meet their performance needs and coach supporting managers on how to reinforce the skills and practices within the workplace
	     o *Custom Workshop Process Documentation (7 Levels)*
	     o *Needs Assessment Conversation /Meeting – Guiding Questions*
	
	• All OHD Staff explored and developed the departmental **Mission, Values, Values**, and goals as a collaborative exercise. (Fall 2015)

	o *Mission Vision Values Post-Retreat Notes - July 2015.* o *The Mission, Vision, and Values are reviewed annually to ensure relevance.*
External • **Cross Campus Focus Groups** In fall 2015 and winter 2016, OHD hosted several focus groups from a wide-selection of employees to ascertain key needs and themes in requests • OHD requests evaluations of all our programs and events (workshops, staff conference)	• *Focus Group Report: Individual Leadership Program* • *OHD uses our evaluations a performance and measurement tool to gage knowledge transfer and understanding. These evaluations also operate as quality control and continuous improvement, valuable stakeholder feedback.*

g) Key processes are assessed for their impact on the physical safety and mental health of all stakeholders, e.g., students, employees, partners, suppliers and other stakeholders.

Organizational & Human Development works with the University of Waterloo policies and guidelines to ensure the physical safety and mental health of our

Action	**Evidence** (Appendices)

• As a department OHD discussed the impact and internal actions associated with the new Emergency Preparedness video - Violent person on campus: know you can survive
   o Discussion Items included:
      ▪ In office actions (lock doors, turn of lights, head to back offices)
      ▪ In workshop /training room actions (creating a barrier using workshop tables, locking the door, hiding the storage cupboard)
	• Agenda from July 28th Planning Day

• OHD uses and follows the University's Flextime and Emergency Days policy.	• University of Waterloo Flextime Policy
• OHD offers research time, each week, to allow for all employees to balance their workload.	• *Typically 3.5 hours per week.*

6. Partners and Suppliers

a) Key partner and supplier groups have been identified e.g.,
- **Financial partners (e.g., government, research agencies, donors, etc.)**
- **Non-financial partners (e.g., volunteers, agencies, charities etc.)**
- **Suppliers.**

Organizational & Human Development has identified key partners and suppliers, both internal and external to the institution.

Action	Evidence (Appendices)
OHD Internal Partners and Suppliers: • In keeping with OHD's commitment to advance and support the personal and professional growth of all employees, OHD partners with Human Resources – Onboarding/Staff Orientation to present new employees with an overview of OHD Core Development Workshops. The four workshops in this series have been identified as programs that are highly recommended for all University of Waterloo employees to take within the first year of their onboarding experience. • Ongoing, OHD cultivates collaborative partnerships with several university departments and subject matter experts to create and, in some instances, co-facilitate innovative learning opportunities for all employees. Key examples: o Co-facilitated by a member of the Office of Academic Integrity, OHD120 – Integrity Matters is one of the four Core Development workshops. o Co-facilitated by a subject matter expert, OHD506 – Sexual Orientation & Gender Identity is one of seven workshops presented in the award winning (2015) series of Inclusivity workshops • The annual OHD Staff Conference actively engages the campus community by encouraging applications for workshops ideas and inviting volunteers to participate in the preparation and running of the conference. Various locations across campus such as Fed Hall and Theatre of the Humanities are contracted to provide adequate venues for the 1200+ university attendees. Campus departments such as PACE (Provost Advisory Committee on Equity) and Catering Services provide prizes and discount coupons for inclusion in the staff registration packages.	• *HR Website: UWaterloo Staff Orientation* *Integrity Matters:* • *Integrity Matters workshop* • *Academic Integrity - University of Waterloo* • Sexual Orientation and Gender Identity and award winning Inclusivity Program • *Waterloo wins employee engagement award* – Feb 22, 2016 OHD Staff Conference • https://uwaterloo.ca/staff-conference/ *Psychological Health and Safety in the Workplace*

• OHD collaborates with Occupational Health to develop and provide programming such as OHD450 – Psychological Health & Safety to promote and support the Mindful Employer initiative.	*Over 480 employees have received psychological health and safety training and the training materials created at Waterloo will soon be available to other Canadian organizations. As the first higher-education institution to adopt the Standard, Waterloo has led the development of a community of practice that now includes 36 universities and colleges from across the country.* Occupational Health/Mindful Employer • https://uwaterloo.ca/daily-bulletin/2016-06-29
• OHD regularly designs and offers custom workshops to satisfy requests made by various campus departments and affiliated and federated institutions	• *Custom Workshop Process Documentation (7 Levels)* • *Needs Assessment Conversation /Meeting – Guiding Questions* • *Request form*
• OHD Leadership Development and Mentorship Programs partner with managers and supervisors from across campus to provide opportunities to build a network of peers and to share best practices with program participants.	• *Leadership Development Framework:* *Leadership Essentials & Leadership Foundations (two immersive, multi module-based programs)*
• OHD promotes awareness to campus-wide learning and development opportunities through personal interaction and posting key links on our website. • OHD creates and publishes the SEW workshops newsletter for the IST department and maintains a page on the OHD webpage to advertise technology workshops	• *Training & Development Opportunities* • *OHD Supporting the Technology Workshops*
• Leadership Forum – Director of OHD coordinates regular meetings of academic support department heads and directors. The meetings offer an opportunity for leaders to connect, create collaborative strategies, and share knowledge of new initiatives and legislative changes.	*Leadership Forum* • *Overview: OHD Relevant Stakeholder experience – See Section on Leadership Forum* *Academic Leadership Program*

• Academic Leadership Program – OHD shares responsibility with the office of the Associate Provost, Resources and the office of VP, Academic and Provost for preparing and delivering orientation sessions for new chairs/directors, associate chairs and associate deans.
 	
• CECA/HIRE Waterloo – OHD employs a University of Waterloo student each term and employs interns as opportunities arise
 	
Institutional Suppliers
 	
OHD contracts several Internal service groups so that a consistent product and service standard is maintained for ongoing workshop programming and special events such as the annual OHD Staff Conference.
OHD Internal Service Groups and Suppliers - Key examples:
• Catering & Event Services
  o Contracted exclusively for the annual OHD Staff Conference
  o Contracted to provide catering for OHD training room; all-day workshops; Academic Leadership Orientation sessions and Chairs' Lunch Forums; Leadership Forum meetings; etc.
• New Media Services
  o Workshop workbooks printing; *The Basic Principles* and *Principles of Inclusivity* posters; OHD Conference agendas, etc.
• Bookstore & Retail Services
  o University of Waterloo branded products and gift certificates are regularly purchased from Retail Services and presented as celebration gifts to staff upon completion of major accomplishments such as graduation from Leadership Development programs
  o OHD coordinates with the Bookstore to ensure copies of books published by OHD Conference Keynote Speakers are available for purchase at conference venue
 	
OHD External Partners and Suppliers:
 	
• OHD abides by the Independent Contractor Process (ICON) policies set forth by Dept. of Finance when hiring an external facilitator for Financial Planning workshops and when contracting keynote speakers for the annual Staff Conference.
 	
• OHD co-created the Business Communication certificate program with subject matter experts and offers the program in a series of six workshops.
 	
To maintain credibility and ensure programing relevance to ongoing trends and practices, OHD staff retain memberships to key industry organizations such as.
	• *https://uwaterloo.ca/chairs/*
	
	Co-Op Employee Program
	• https://uwaterloo.ca/hire/
	• OHD's *Co-Op Employee Manual*
	
	• *https://uwaterloo.ca/catering/*
	
	• *http://www.newmediaservices.uwaterloo.ca*
	
	• *http://www.retailservices.uwaterloo.ca*
	
	• *http://www.bookstore.uwaterloo.ca*
	
	• *https://uwaterloo.ca/staff-conference/keynote-sessions*
	
	• Finance: ICON
	
	• Business Communications certificate program
	• Sample Certificate
	
	Through membership in these organizations there is awareness and opportunities to participate in conferences and webinars. Recent examples:

- College and University Professional Association for Human Resources (CUPA-HR) - Human Resources Professional Association– Grand Valley Chapter (HRPA-GV) - The Institute for Performance and Learning (IPL) - LeanHEHub – Collaboration and affiliation led to OHD organizing and hosting the 2015 Lean Conference at Fed Hall, University of Waterloo. OHD staff worked in collaboration with staff in Conference Management Services.	*OHD proposal was accepted to present on POI at CUPA-HR Annual Conference & Expo - Sept 2016 – two OHD staff members co-presenting* *The Art of Leadership – Toronto Conference – October 21, 2016 – all OHD staff registered* *Institute of Performance and Learning Conference, Toronto – November 2-4, 2016 – one OHD staff member attending* *HRPA-GV – 2016 Bi-Annual Conference, Fed Hall – University of Waterloo June 22, 2016 – 2 OHD staff members attended* *Leadercast 2016 – sponsored by Cambridge Chamber of Commerce, May 6, 2016 – all OHD staff attended* *HRPA Executive Night – March 12, 2015 – all OHD staff attended* *https://uwaterloo.ca/lean-conference/*
Some external subscriptions/memberships are maintained for the purpose of obtaining/purchasing workbooks and materials directly relevant to OHD programming. - Achieve Global (an MHI global Company)– Principles and Qualities of Genuine Leadership: Participant Workbook – given to each participant in OHD106 – Principles of Leadership Workshop - Career Life/Skills Resources – each participant enrolled in OHD601 – Personality Dimensions complete an online survey to obtain their colour profile. 4imprint Canada is used for several marketing items as well as branded supplies for the annual staff conference.	*https://www.mhiglobal.com/* *http://clsrassessments.com/* *4imprint.ca*

b) A policy (or policies) is in place that includes different forms of partner and supplier relationships.

Organizational & Human Development (OHD) has created policies when dealing with differing partner relationships, especially internal to, or affiliated with, the institution.

Action	**Evidence** (Appendices)
• OHD has negotiated a Service Level Agreement with Renison University College, an affiliated institution to UWaterloo. The objective is to provide Renison's community with the same opportunities provided by OHD to staff on main University of Waterloo campus. Potentially, the remaining affiliated institutions (3) will follow suit.	• *Renison Service Level Agreement*
• OHD regularly contracts key partners and suppliers, identified under preferred vendors in Procurement Policies and Guidelines, and develops contracts with additional vendors to secure quality products and services.	• *OHD has accounts set up with several vendors including the following:* o *Staples – online order form* o *Delta Waterloo* o *Stagecoach Limousine Service* o *Frederick Travel* o *Waterloo Taxi* o *Amazon Canada*
• When engaging the services of these vendors OHD abides by procedures set out by Finance for the use of P-Card, AMEX and WatCard.	• *UWaterloo Finance Policies, Procedures, and Guidelines*

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c) Appropriate information and criteria is used to select capable financial and non-financial partners and suppliers.

Organizational & Human Development (OHD) followed the principles and guidelines set forth by the institution in the selection and practice of using our financial partners and suppliers.

Action	**Evidence** (Appendices)
• OHD relies on referrals and recommendations from colleagues and associates when collaborating with or hiring external facilitators and co-facilitators. • OHD adheres to the guidelines set forth in the Policies and Guidelines for Procurement and Contract Services	• *UWaterloo Finance Policies, Procedures, and Guidelines*

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d) The university establishes and maintains co-operative working relationships with key partners and suppliers, and responds to feedback effectively.

Organizational & Human Development strives to maintain co-operative working relationships with our partners and suppliers, both internal and external to the institution.

Action	Evidence (Appendices)
OHD Internal Partners and Suppliers: • In keeping with OHD's commitment to advance and support the personal and professional growth of all employees, OHD partners with Human Resources – Onboarding/Staff Orientation to present new employees with an overview of OHD Core Development Workshops. The four workshops in this series have been identified as programs that are highly recommended for all University of Waterloo employees to take within the first year of their onboarding experience. • Ongoing, OHD cultivates collaborative partnerships with several university departments and subject matter experts to create and, in some instances, co-facilitate innovative learning opportunities for all employees. Key examples: o Co-facilitated by a member of the Office of Academic Integrity, OHD120 – Integrity Matters is one of the four Core Development workshops. o Co-facilitated by a subject matter expert, OHD506 – Sexual Orientation & Gender Identity is one of seven workshops presented in the award winning (2015) series of Inclusivity workshops • The annual OHD Staff Conference actively engages the campus community by encouraging applications for workshops ideas and inviting volunteers to participate in the preparation and running of the conference. Various locations across campus such as Fed Hall and Theatre of the Humanities are contracted to provide adequate venues for the 1200+ university attendees. Campus departments such as PACE (Provost Advisory Committee on Equity) and Catering Services provide prizes and discount coupons for inclusion in the staff registration packages. • OHD collaborates with Occupational Health to develop and provide programming such as OHD450 – Psychological Health & Safety to promote and support the Mindful Employer initiative.	• *HR Website: UWaterloo Staff Orientation* *Integrity Matters:* • *Integrity Matters workshop* • *Academic Integrity - University of Waterloo* • Sexual Orientation and Gender Identity and award winning Inclusivity Program • *Waterloo wins employee engagement award – Feb 22, 2016* OHD Staff Conference • https://uwaterloo.ca/staff-conference/ • *Psychological Health and Safety in the Workplace Over 480 employees have received psychological health and safety training and the training materials created at Waterloo will soon be available to other*

	Canadian organizations. As the first higher-education institution to adopt the Standard, Waterloo has led the development of a community of practice that now includes 36 universities & colleges from across the country. Occupational Health/Mindful Employer • https://uwaterloo.ca/daily-bulletin/2016-06-29
• OHD regularly designs and offers custom workshops to satisfy requests made by various campus departments and affiliated and federated institutions	• *Custom Workshop Process Documentation (7 Levels)* • *Needs Assessment Conversation /Meeting – Guiding Questions* • *Request form*
• OHD Leadership Development and Mentorship Programs partner with managers and supervisors from across campus to provide opportunities to build a network of peers and to share best practices with program participants.	• *Leadership Development Framework:* *Leadership Essentials & Leadership Foundations (two immersive, multi module-based programs)*
• OHD promotes awareness to campus-wide learning and development opportunities through personal interaction and posting key links on our website. • OHD creates and publishes the SEW workshops newsletter for the IST department and maintains a page on the OHD webpage to advertise technology workshops	• *Training & Development Opportunities* • *OHD Supporting the Technology Workshops*
• Leadership Forum – Director of OHD coordinates regular meetings of academic support department heads and directors. The meetings offer an opportunity for leaders to connect, create collaborative strategies, and share knowledge of new initiatives and legislative changes.	*Leadership Forum* • *Overview: OHD Relevant Stakeholder experience* – *See Section on Leadership Forum*
• Academic Leadership Program – OHD shares responsibility with the office of the Associate Provost, Resources and the office of VP, Academic and Provost for preparing and delivering orientation sessions for new chairs/directors, associate chairs and associate deans.	*Academic Leadership Program* • *https://uwaterloo.ca/chairs/*

• CECA/HIRE Waterloo – OHD employs a University of Waterloo student each term and employs interns as opportunities arise
 	
Institutional Suppliers
 	
OHD contracts several Internal service groups so that a consistent product and service standard is maintained for ongoing workshop programming and special events such as the annual OHD Staff Conference.
 	
OHD Internal Service Groups and Suppliers - Key examples:
• Catering & Event Services
   o Contracted exclusively for the annual OHD Staff Conference
   o Contracted to provide catering for OHD training room; all-day workshops; Academic Leadership Orientation sessions and Chairs' Lunch Forums; Leadership Forum meetings; etc.
• New Media Services
   o Workshop workbooks printing; *The Basic Principles* and *Principles of Inclusivity* posters; OHD Conference agendas, etc.
• Bookstore & Retail Services
   o University of Waterloo branded products and gift certificates are regularly purchased from Retail Services and presented as celebration gifts to staff upon completion of major accomplishments such as graduation from Leadership Development programs
   o OHD coordinates with the Bookstore to ensure copies of books published by OHD Conference Keynote Speakers are available for purchase at conference venue
 	
OHD External Partners and Suppliers:
 	
• OHD abides by the Independent Contractor Process (ICON) policies set forth by Dept. of Finance when hiring an external facilitator for Financial Planning workshops and when contracting keynote speakers for the annual Staff Conference.
 	
• OHD co-created the Business Communication certificate program with subject matter experts and offers the program in a series of six workshops.
 	
To maintain credibility and ensure programing relevance to ongoing trends and practices, OHD staff retain memberships to key industry organizations such as.
• College and University Professional Association for Human Resources (CUPA-HR)
 	
• Human Resources Professional Association– Grand Valley Chapter (HRPA-GV)
	Co-Op Employee Program
	• https://uwaterloo.ca/hire/
	• OHD's *Co-Op Employee Manual*
	
	• *https://uwaterloo.ca/catering/*
	
	• *http://www.newmediaservices.uwaterloo.ca*
	
	• *http://www.retailservices.uwaterloo.ca*
	
	• *http://www.bookstore.uwaterloo.ca*
	
	• *https://uwaterloo.ca/staff-conference/keynote-sessions*
	
	• Finance: ICON
	
	• Business Communications certificate program
	• Sample Certificate
	
	Through membership in these organizations there is awareness and opportunities to participate in conferences and webinars. Recent examples:
	• OHD proposal was accepted to present on POI at CUPA-HR Annual Conference & Expo - Sept

• The Institute for Performance and Learning (IPL)	2016 – two OHD staff members co-presenting
• LeanHEHub – Collaboration and affiliation led to OHD organizing and hosting the 2015 Lean Conference at Fed Hall, University of Waterloo. OHD staff worked in collaboration with staff in Conference Management Services.	• The Art of Leadership – Toronto Conference – October 21, 2016 – all OHD staff registered
	• Institute of Performance and Learning Conference, Toronto – November 2-4, 2016 – one OHD staff member attending
	• HRPA-GV – 2016 Bi-Annual Conference, Fed Hall – University of Waterloo June 22, 2016 – 2 OHD staff members attended
	• Leadercast 2016 – sponsored by Cambridge Chamber of Commerce, May 6, 2016 – all OHD staff attended
	• HRPA Executive Night – March 12, 2015 – all OHD staff attended
	• https://uwaterloo.ca/lean-conference/
Some external subscriptions/memberships are maintained for the purpose of obtaining/purchasing workbooks and materials directly relevant to OHD programming.	
• Achieve Global (an MHI global Company)– Principles and Qualities of Genuine Leadership: Participant Workbook – given to each participant in OHD106 – Principles of Leadership Workshop	• https://www.mhiglobal.com/
• Career Life/Skills Resources – each participant enrolled in OHD601 – Personality Dimensions complete an online survey to obtain their colour profile.	• http://clsrassessments.com/
• 4imprint Canada is used for several marketing items as well as branded supplies for the annual staff conference.	• 4imprint.ca

e) Prior to procurement and whenever possible, employees are involved in assessing the impacts of products or services that impact on their health, safety and/or productivity.

Organizational & Human Development engages all staff when making new purchases or alternations to service that may impact health or productivity.

Action	Evidence (Appendices)
OHD encourages staff involvement in the selection process of supplies and office equipment/environment: • Office lighting adjustments • Dual screens – purchased as necessary • Training room furniture – chair and table samples were obtained for staff to test prior to purchase • Adjustable office chairs/tables purchased when OHD moved to new offices in fall 2014 • Workshop supplies purchased based on facilitator preferences • Marketing posters – various sizes obtained to assist facilitators meet campus department requests • OHD purchases **accessible furniture** for our training room. OHD ensures that their staff complete the necessary mandatory and compliance required training such as WHIMIS, AODA, Violence in the workplace, anti-spam legislation etc.). It is a part of our on-boarding of new staff, new coops and new interns. OHD checks annually that all required training is up to date. • OHD completed the Job Hazard analysis as per the Safety Office's request. • OHD participates in the workplace safety inspections and conducts a monthly self-audit. • OHD has a first aid kit and an employee trained in Standard First Aid	• *Purchase of our training room chairs included adjustable height, arms and no arms for comfort and safety.* • *All OHD staff review ergonomic and safety maters when engaging in purchasing new furniture and equipment.* • *Safety Office: Policies & Legislation*

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f) Baseline partner and supplier performance measures are identified and collected.

Organizational & Human Development utilizes evaluation forms as a performance measurement tool for all our workshops and events, including those who are partners and suppliers.

Action	**Evidence** (Appendices)
Evaluation forms: Externally facilitated workshops • To ensure OHD workshop participants are satisfied with external facilitators' subject expertise and worth of subjects covered, workshop participants are invited to complete an evaluation form. The completed forms are reviewed by OHD staff and filed. **OHD Staff Conference**: • All attendees are encouraged to complete a satisfaction survey that covers all aspects of the conference – keynote speakers, venue, food, etc. In addition, at the end of each workshop registrants are encouraged to complete an evaluation form. Information obtained from these satisfaction surveys are reviewed to determine various satisfaction levels to assist in future planning.	• *OHD reviews **evaluations** and make improvements on content, delivery and materials as suggested or make note for group discussion on how changes or suggestions can be implemented for future offerings.* • *Staff Conference engages participants with a post conference survey to assess ideas for improvement.* • *Evaluation of every workshop post offering allows for our programming to be continuously improved.*

Conclusion

In undertaking this task, Organizational & Human Development (OHD) was naturally apprehensive about meeting the Excellence, Innovation, and Wellness (EIW) standard for the Excellence Canada Silver application. As the process began, and the team as a collective unit worked on this extensive project, we began to explore our own unit and its connection to the institution on a deeper level than before and truly developed a greater understanding of our work, our team, and how our specific department "fits" into the institution.

When working on the assessment worksheets for the key drivers of Excellence Canada's EIW standard, it became clear that OHD was very well developed in certain areas and had room to mature in others. As the University of Waterloo's learning and development unit, it is natural that a consistent area of strength is Leadership & Governance. Since the departmental inception, OHD has been working to create comprehensive leadership development opportunities on campus for employees, with a heavy focus on continuous learning and improvement. Collaboration has been a key goal of OHD as we grew and developed. We worked with other campus units to create new experiences for employees, either with new workshops or events, such as the annual staff conference, or on new initiatives, such as the Principles of Inclusivity. OHD, at its core, strives to support lifelong learning for the campus community.

Another key area of strength for OHD is that of Service Excellence, which is, again, natural as OHD as created the benchmark Service Excellence standard for the University of Waterloo through the Exceptional Service workshop. As part of Core Development workshops, all new employees are highly encouraged to complete the workshops within the first year of their onboarding experience ensuring our service excellence standards are reiterated on campus. As part of this commitment, OHD has promoted the Basic Principles to demonstrate a healthy philosophy on maintaining a constructive workplace environment. As well, OHD assisted in the creation of the Principles of Inclusivity which present to present the ideals by which campus members should engage one another – with respect, sensitivity, and fairness. Finally, OHD has continuously placed a large focus on the needs of our stakeholders, the employees and the students, to assist in the ongoing crafting of an institution we, as a unit, will be proud to be a part of for decades to come.

Indeed, as OHD enters the second decade of its formative "Teen Years," new topics and themes to explore and develop, such as the creation of a Mentorship program and of a manager's development day (as part of the 10TH anniversary of the annual staff conference) will further our growth and develop Waterloo's employees. Using the knowledge gained from the Excellence Canada process, specifically our areas for development, will assist OHD to achieve these goals and in guiding our path in the coming years.