

People, Process and Projects (P3) Community of Practice

Established January 2024, the People, Process and Projects Community of Practice advocates for best practices of change management, continuous improvement and project management methodologies.

Our approach is a collaborative one, where members learn through the sharing of experiences, ideas, concepts, best practices, tools and resources.

Our vision is to evolve and accelerate learning of the three practices at the University of Waterloo through regular engagement and thought partnerships to support achievement of goals and objectives.

Interested in learning more? Join today!



>365
Members

5
Community
sessions

5
Showcase
Events

7
Webinar
Wednesday

Contacts

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Next generation electronic access control

The What

Building upon the foundation of the current access control platform to address the current and future needs of physical access security at the University of Waterloo

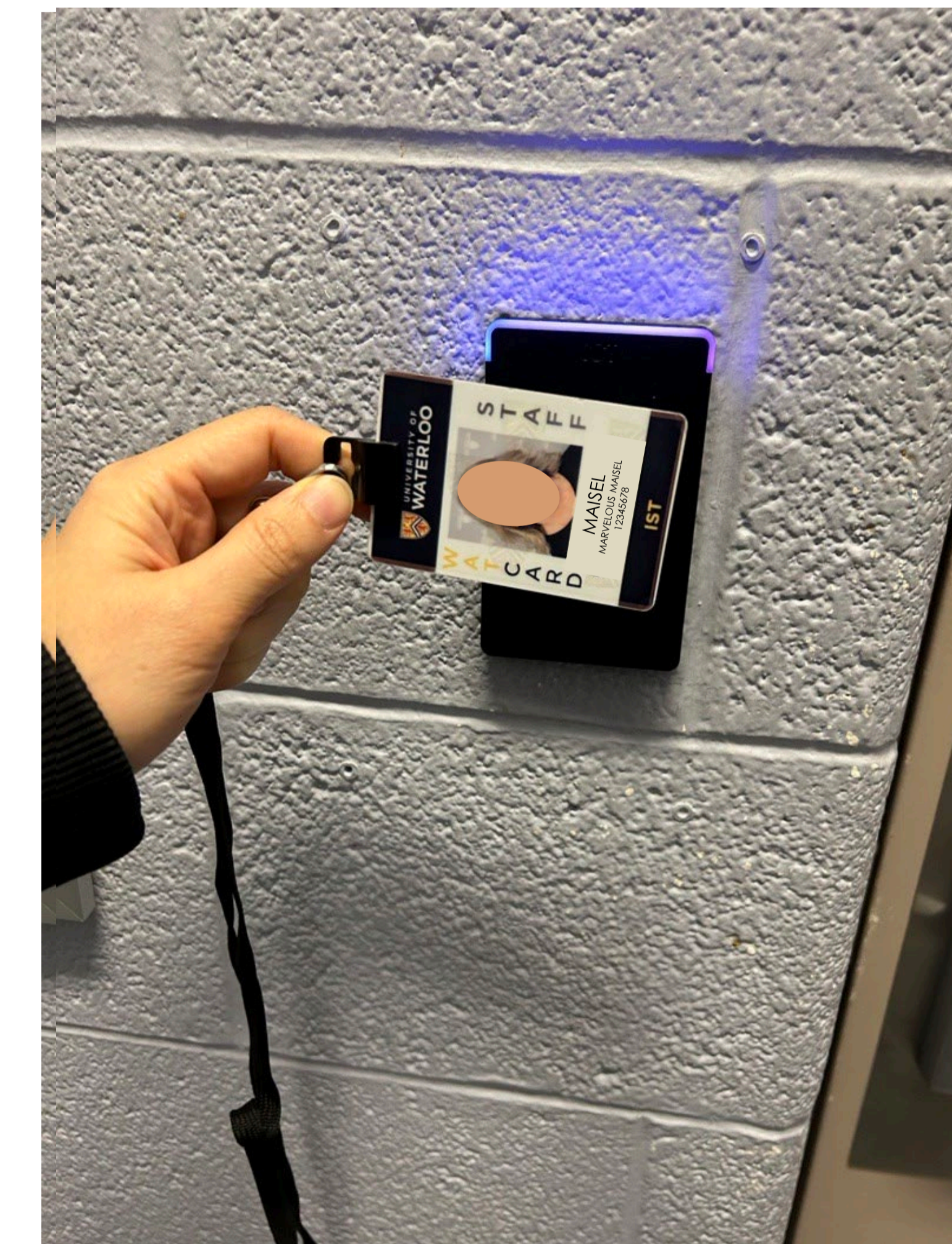
The Why

Enhance safety and security while minimizing risk and vulnerabilities

- Life safety
- People
- Assets and research
- Daily operation

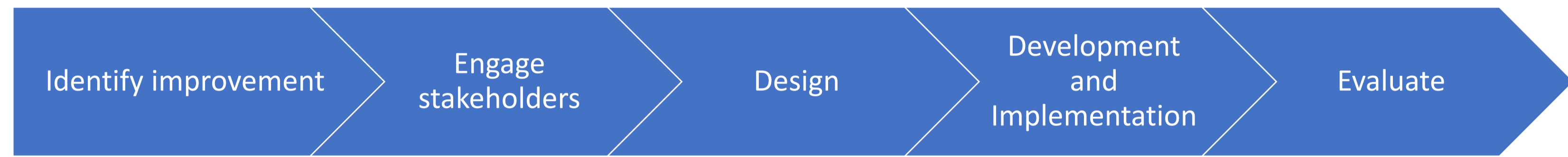
The How

An integrated, centrally managed, monitored and maintained approach



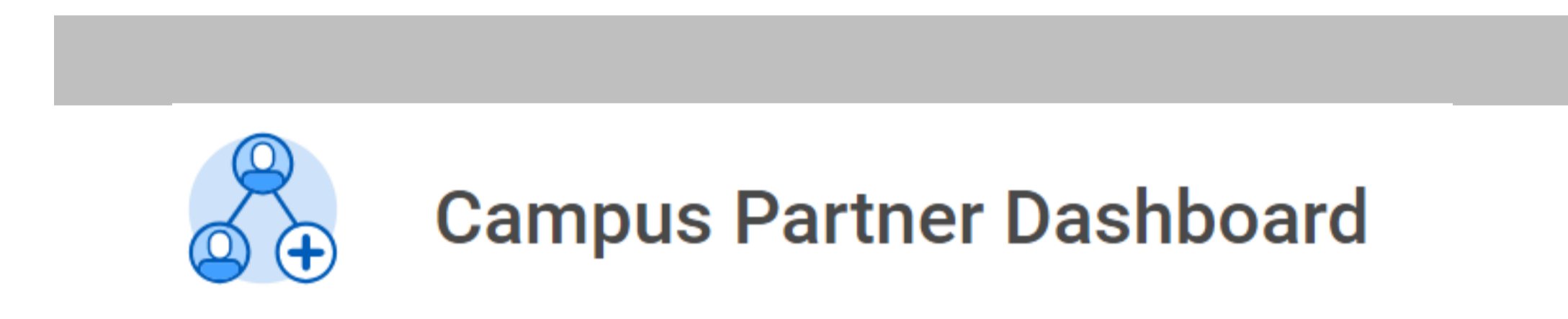
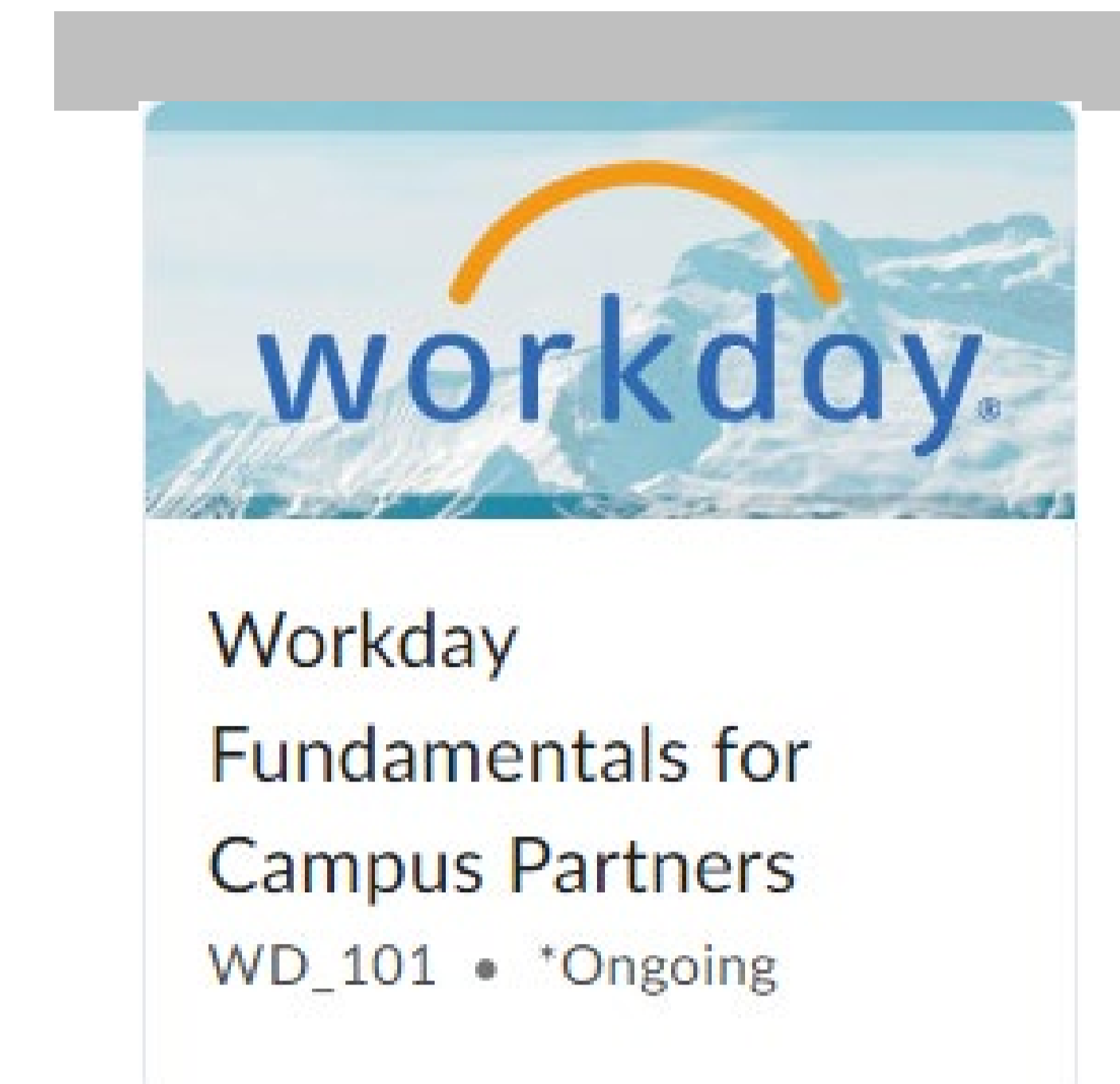
Project completion planned for December 31, 2028

Workday Fundamentals for Campus Partners



Collaborated with Campus users

- Campus Partner
- Managers
- HR Operations
- OHD
- HR Partners



Problem Statement

As a result of turnover in positions that have the Campus Partner security role in Workday, new individuals were not receiving standardized training, resulting in increased challenges to complete required processes such as hiring which can negatively impact a new hire.

Main Objectives

Provide Campus Partners with the tools and resources to confidently navigate Workday, UWaterloo's HR system, while optimizing the platform and simplifying task management

Reduce transaction errors that lead to delays in finalization and enable users with on-demand support

Implementation Approach

Phase 1:

- Developed a presentation including videos demonstrating key Workday features and processes for Campus Partners.
- Engaged super-users for Q&A facilitation and a scavenger hunt.
- Created a dashboard for commonly used reports and tasks and enhanced support resources for users.

Workshops facilitated in December 2023

Phase 2:

- Developed an asynchronous, self-guided course for Campus Partners, featuring content, interactive activities, demonstrations, and quizzes.
- Facilitated user acceptance testing and incorporated feedback.
- Implemented a requirement for course completion before assigning security roles.

Workday Fundamentals for Campus Partners lunched

June 1, 2024

Feedback from Campus Partners

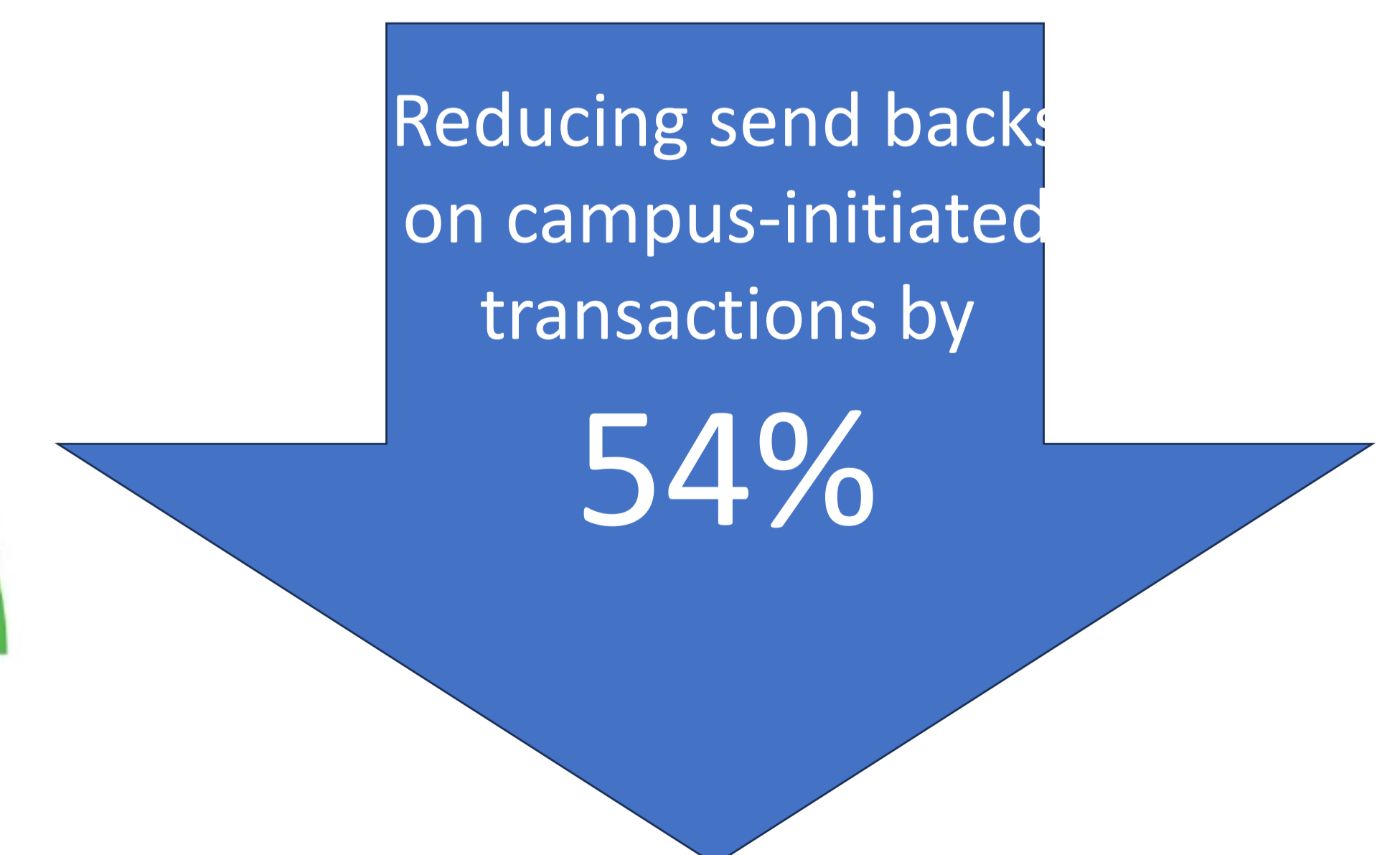
"This would have been great when I started!"

"I love the new Campus Partner Dashboard... thank you very much! SO much easier to navigate the system"

"This course has helped me understand the hiring process"



USER EXPERIENCE



ENTERPRIZE CHANGE MANAGEMENT @ WATERLOO

Under the direction of the Director Strategy and Operations, within the Office of the Vice President Administration and Finance, our Change Management Prosci® and CCMP™ certified representative offers a campus wide streamlined approach to supporting employees through change initiatives.

Our mission is to:

- Offer a consistent approach to Change Management
- Manage change in a transparent and effective way
- Engage and consult with those impacted by the change
- Minimize the perceived negative impacts of the change
- Help employees build internal capacity for managing change with a goal of increasing the success of change initiative(s)

Learn more about change management at Waterloo



1

Change Management Advisor (Enterprise-wide initiative support)

9

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

22+

Conference sessions / presentations and panel discussions

1

People, Process & Projects (P3) Community of Practice

"Very thorough, engaging and applicable workshop on managing change. It included discussion, activities and UW specific examples of recent change." Workshop participant

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

Enterprise-wide activities

2019 – present

- Two-Factor Authentication (2FA)
- Holistic Benefits Review
- Virtual Convocation
- OneDrive Advocacy
- Return to Campus & Work from Home interim guidelines
- M365 Program
- WCMS 3.0
- External Examiner Payment Process
- Policy 14
- LTD Extended Benefits
- Health Care & Dental Benefits
- Change Champion networks
- Health Safety, Environmental Management System
- Policy 29
- Parking

Resources:

- Change Management Website
- Change Management Programming
- IT Change Champions
- Change Management tools and templates
- People, Process and Projects (P3) Community of Practice
- Change Management micro learning

CHANGE MANAGEMENT BY THE NUMBERS

3

Employee focused workshops

1000+

Prosci ADKAR® trained employees

15 +

Customised course requests

360+

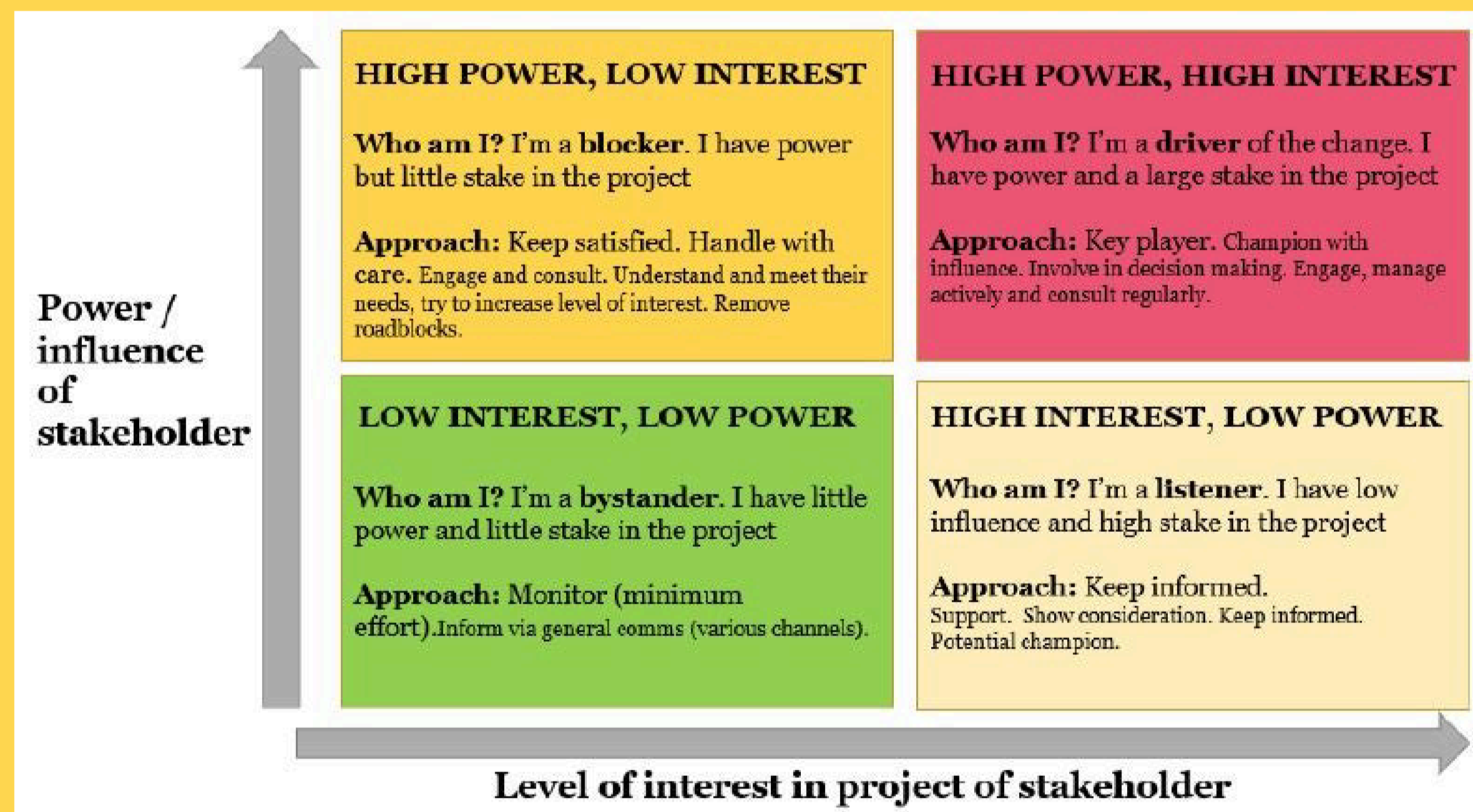
Community of Practice members

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

All tools Change Management

Ask an expert!

Stakeholder Matrix



About the tool

Enables us to:

- categorize stakeholder groups
- help visualize and understand the volume of stakeholders
- document and determine each stakeholder's level of commitment
- focus on and prioritize resources
- uncover potential risks that may arise during the project

Learn more about change management at Waterloo



Sizing the Change

Tool layout

Three categories are evaluated within the assessment tool

1. Setting the stage for the change
2. Determining the degree of impact
3. Risk

Sizing the change assessment tool		Enter project name here	Reset form	Print
This tool will help the change leader report on the Change Management efforts and plan for the given change initiative.				
Category 1: Setting the stage for change	Pick your response <i>(score will be automatically calculated)</i>			
Has the change been defined (goals, vision/mission, why the change is being made)?	0			
Do the goals align with the departmental/organization strategic plan?	0			
Do you have the authoritative support (sponsor, department head, etc.) needed to implement the change?	0			
Has a sponsor(s) been identified?	0			
Is the sponsor(s) supportive of the change?	0			
Is the sponsor able to articulate the change?	0			
Does the sponsor have the influence to obtain the resources for the change?	0			
Does the sponsor have influence over obtaining the funding for the change?	0			
Setting the stage for change score	0			
Category 2: Determining the degree of impact	Pick your response <i>(score will be automatically calculated)</i>			
Have stakeholder (people directly impacted by the change) groups been identified?	2			
How many people does the change impact? Indicate 'yes' for <100, 'somewhat' for 100-500, and 'no' for >500	1			
Who does the change impact? Indicate 'yes' for your immediate team, 'somewhat' for a unit/organization or 'no' for the University	1			
Have past changes (within a team, department or organization) been positively received by the stakeholders?	1			
Do stakeholders have capacity (workload constraints, resources, knowledge, etc.) to adopt the change? (Consider change fatigue)	1			
Has the change been communicated to stakeholders?	0			
Determining the degree of impact score	6			
Category 3: Risk	Pick your response <i>(score will be automatically calculated)</i>			
Have the risk(s) (an uncertain event or condition that may positively or negatively impact the change) been identified?	2			
Are stakeholders willing to adopt the change?	1			
Do you have adequate resources (budget, people, skills, etc.) to implement the change?	1			
Are you (or the individual implementing the change) supportive of the change?	0			
Risk score	4			
Overall assessment score (category 1-2-3)	10	Medium Change		

About the tool

Use this interactive tool to evaluate the degree of CM activities needed to support the change and to maximize change management benefits.



Are you Change Ready?

Whether you are an adopter of change or leading the change, use these readiness assessment tools to determine the level of change preparedness.

Individual assessment tool

Designed for individuals impacted by the change. Focus change management activities on questions that cannot be confidently checked off.

Change Management readiness assessment

As an adopter of the change:

- Do I know what's changing?
- Do I know why we are changing?
- Do I know the benefits of the change?
- Can I explain the change to a colleague / friend?
- Do I understand the risks to my area of not changing?
- Do I believe in the change?
- Do I know how the change will impact me?
- Do I support the change? If not, why not?
- Can I implement the change?

Change leader assessment tool

Designed for the change leader to determine the level of preparedness of team members. Focus change management activities on questions that cannot be confidently checked off.

The managers role in change management initiatives

I will support my team through the change by....

- Considering how the change will impact each team member
- Evaluating how change ready my team is
- Understanding what my team will need from me to support them through the change
- Engaging my team in the change process
- Addressing concerns voiced
- Keeping them informed by communicating updates regularly using a variety of channels
- Exploring whether I need to engage other groups to implement the change

Prosci® ADKAR

Developed by Prosci® industry leader in Change Management, this free tool helps guide individuals or groups through change.

The tool identifies five steps individuals need to achieve for positive change outcomes to be realized.

A	Awareness – Of the need for change
D	Desire – To participate and support the change
K	Knowledge – On how to change
A	Ability – To implement desired skills & behaviors
R	Reinforcement – To sustain the change

Tool highlights

Provides the user with:

- a common approach to change.
- a common language to use when discussing change.
- clear goals to track progress through the change.
- insight into where barriers or areas of resistance lie.

Reinforces the value of clear communication.

Download ADKAR eBooks

www.prosci.com/methodology/adkar

Discover the power of the Prosci ADKAR Model with our free eBooks.

[Download eBooks](#)

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CRITICAL THINKING

Enhancing your skills through fun and games!



A Project Manager will use Critical Thinking to:

- Understand and use new information
- Identify, evaluate, and solve problems
- Make sound decisions

A Change Management Practitioner will use Critical Thinking to:

Understand the needs, expectations, and emotions of the people affected by the change

To design and deliver appropriate interventions that support their transition

A Continuous Improvement Practitioner will use Critical Thinking to:

Navigate complex situations more effectively

Analyze information, question assumptions, and make informed decisions

Enhance their CI skills as critical thinking is a type of thinking that requires continuous questioning, exploring answers, and making judgments

To develop and maintain critical thinking skills:

It is essential to engage in a variety of brain-teasing activities

These challenges facilitate the refinement of one's logical reasoning, pattern recognition, and analytical abilities.

Types of Activities:

Puzzle games: These help develop reasoning and problem-solving skills.

Strategy games: Encourage strategic thinking and planning.

Logic games: Enhance logical reasoning abilities.

Brain teasers and riddles: Stimulate brain activity.

Puzzle #1: How Old Am I?

Name: _____ Date: _____

Directions: Read the descriptions of the kids to find out their ages. Write the kids' ages below.

- *Kelly is 3 years older than Pete.
- *Jack is the same age as Ashley.
- *Max is 2 years older than Kelly.
- *Pete is 9 years old.
- *Ashley is 3 years younger than Max, and 2 years older than Maddy.

2. MAN BOARD 3. STAND I
4. |R|E|A|D|I|N|G| 5. WEAR LONG 6. ROAD LONG A D
7. 8. 9. LE VEL 10. 10. $\frac{1}{2}$ N D
11. 12. 13. CHAIR
14. 15. 16. 17. 17. HAND MATTER
18. 19. ECNALG 20. DEATH LIFE

Answers @ www.puzzles-world.com

Approaches to Critical Thinking:

- Ask Questions
- Question your basic assumptions
- Identify your personal biases and prejudices
- Practice continued curiosity
- Never assume you are right

TEST YOUR CRITICAL THINKING SKILLS

Mandatory Cyber Security Training at Waterloo



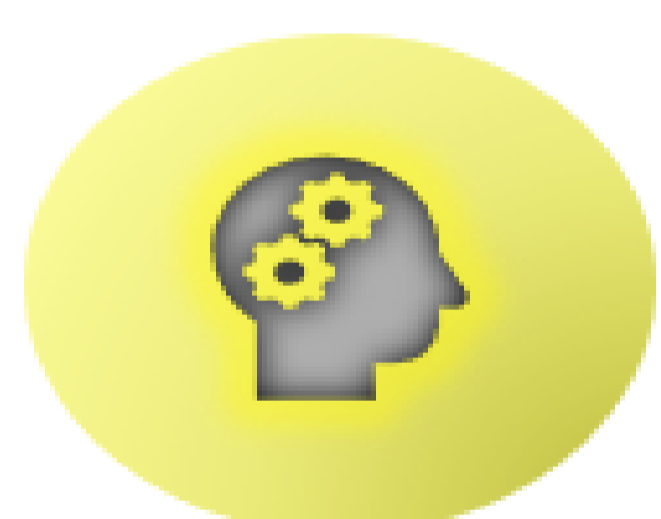
Current Issues:

Many breaches and security attacks result from a lack of employee awareness of the IT security risks related to their actions online at work and at home.

Project Purpose:

To promote cybersecurity awareness around campus through the delivery of an online mandatory training course.

Project Scope & Deliverables



Review current state of security training (Internal & External)



Analyze security trainings at Waterloo



Develop a plan to mandate cyber security training at Waterloo



Develop a communication and implementation plans



Sponsor	• Jason Testart
Project Manager	• Maher Shinouda
Project Stakeholders	• UCIST/CTSC, Secretariat, FAUW, UWSA, CUPE, Office of Research, HR, IST, Department/Faculty
Project Team	• Andriana Vanezi, Terry Labach, Natasha Jennings, Mike Hurst, Rochelle Davies, Nichole Bugarsky, Heather Westmorland

Leadership community

- 28 questions
- 21 respondents



- 100% of leadership respondents agree or strongly agree to mandate training for all employees

IT community

- 8 questions
- 101 respondents
- Good mix



- 86% of IT respondents agree or strongly agree to mandate training for all employees

Audience Analysis

- Information Worker
- Sensitive Information Worker
- Information Technology Worker

Analysis Factors

- Information Systems
- Risk & Impact
- Challenges
- Motivation

Audience Groups

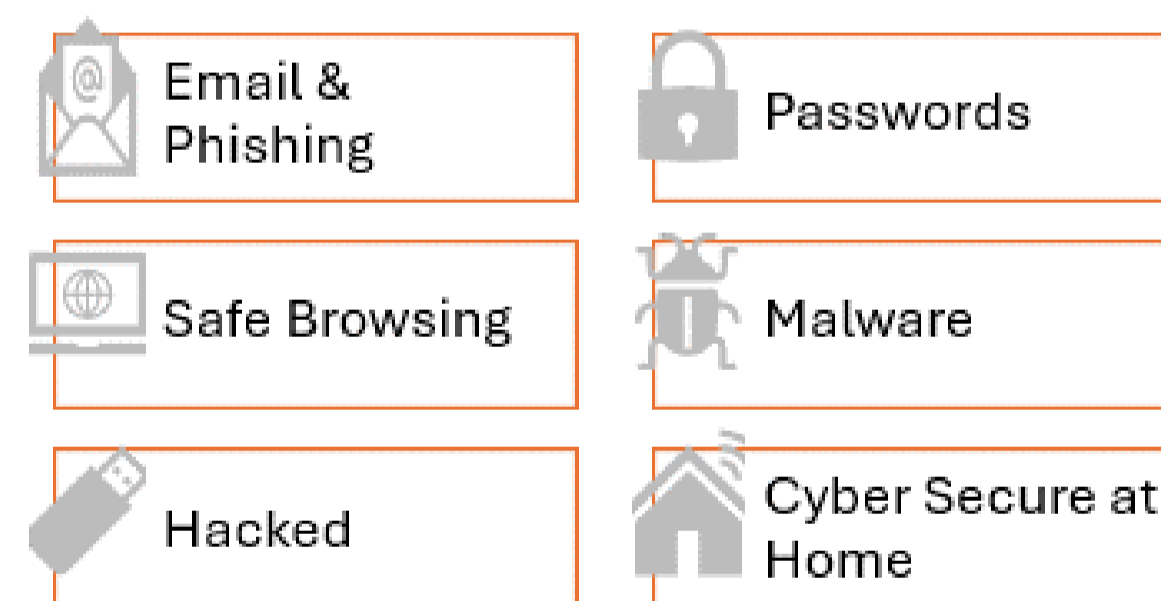
- Administrative
- Leadership
- Academic
- Research
- Auxiliary



Cyber Awareness Essentials

Online | ISAT_SE1 | 30 mins

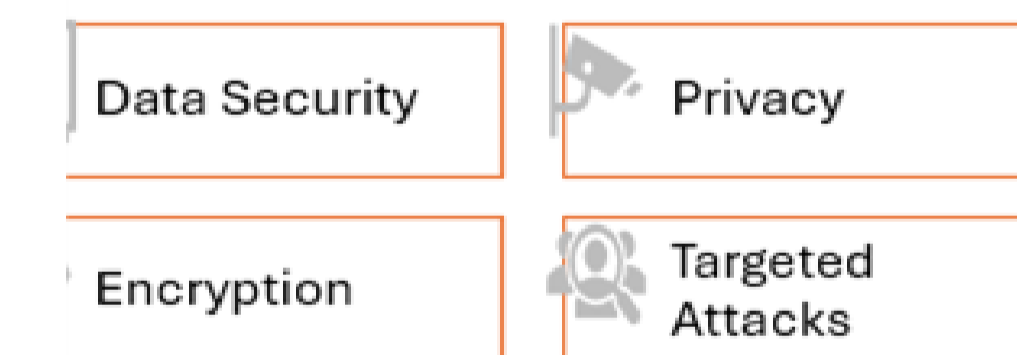
- Purpose:
 - Cyberattacks that exploit human vulnerabilities to bypass technological defenses
 - Knowledge and awareness to identify and report signs of a potential attack
 - Develop a strong cyber shield and improve their cyber-detection skills
- Who should take this course?
 - All Employees



Cyber Awareness for Knowledge Workers

Online | ISAT_SE2 | 20 mins

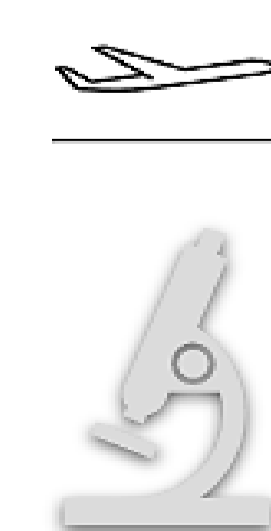
- Purpose:
 - Comprehensive overview of the importance of safe data-handling practices and privacy principles throughout the data lifecycle
 - Critical role security controls such as encryption play in protecting sensitive information from advance targeted attacks.
- Who should take this course?
 - All Employees that work with UW information



Cyber Security for Researcher

Online | ISUR_2 | 45 mins

- Purpose:
 - Current cyber threat landscape
 - Importance of cyber security in the research field
 - Practical advice on how to maintain good cyber hygiene practices while working or traveling internationally
- Who should take this course?
 - Researchers



Safeguarding Research

Online | ISUR | 35 mins

- Purpose:
 - balance research openness with necessary protection
 - importance of a proactive and strategic approach to research security
 - considering the potential uses of the research and lengths to which others may go to acquire it
 - develop effective mitigation tools and strategies in collaboration with institutional or expert support
- Who should take this course?
 - Researchers



Educational Technology (EdTech) Support Model Enhancements

Problem Statement

Due to rapid pace of change, increased demand, and expectations, the current edtech support model is not always meeting the needs of the users and support staff resulting in frustration and time wasted.

Goal

Create a sustainable support model that meets the needs of instructors, students and staff now and in the future.

Scope - Phase 1

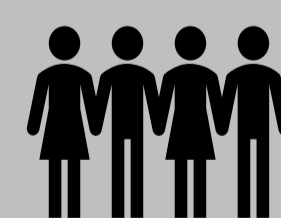
IST processes to address issues and requests for centrally supported Edtech tools and services (including classroom technologies) used by students and instructors.

EdTech is the name for digital technology used to facilitate learning.



Phase 1 Project team;

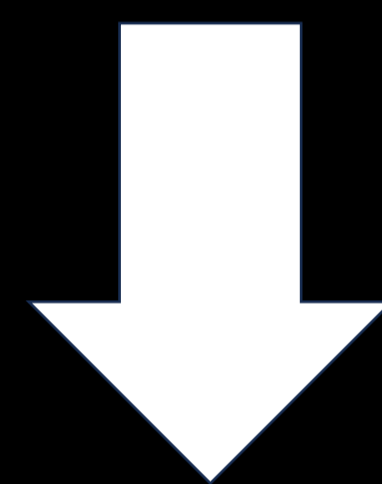
Shona Dunseith, HR
Pam Fluttert, IST
Scott Anderson, IST
Marcel David, IST
Lisa Tomalty, IST
Theepiga Sritharan, IST
Samantha Murray, VPFA
Wendy Hague, PMO



Methodology

Inputs:

- ✓ EdTech related initiatives: IT Review, LEARN Review, and Digital Learning Strategy
- ✓ Current state assessment of EdTech support models and metrics at Waterloo
- ✓ Survey of other higher ed support models
- ✓ Focus groups with Waterloo instructors, students and support staff
- ✓ Change management



Edtech support model future state in IST

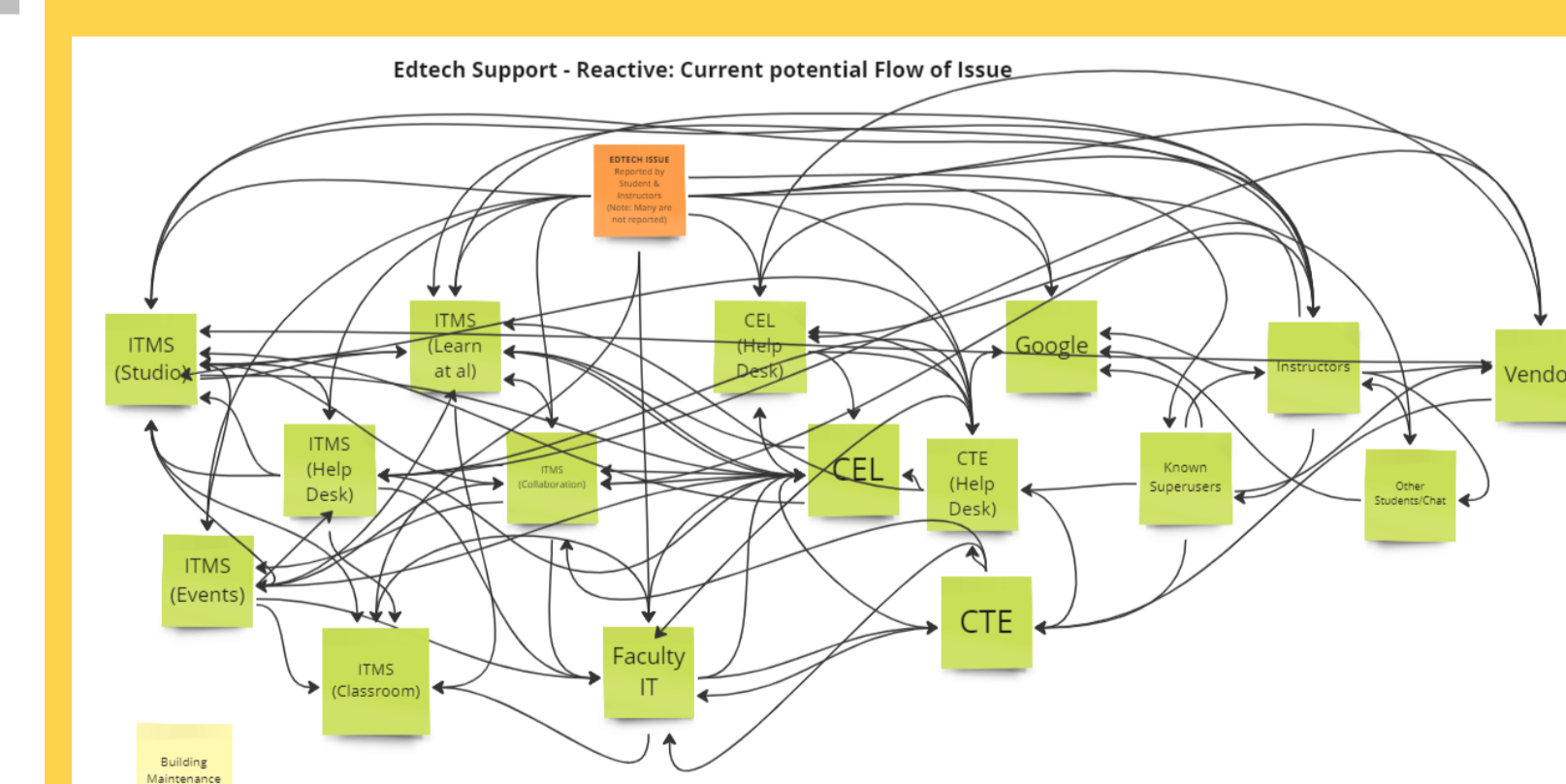


Process Mapping - EdTech Support Model

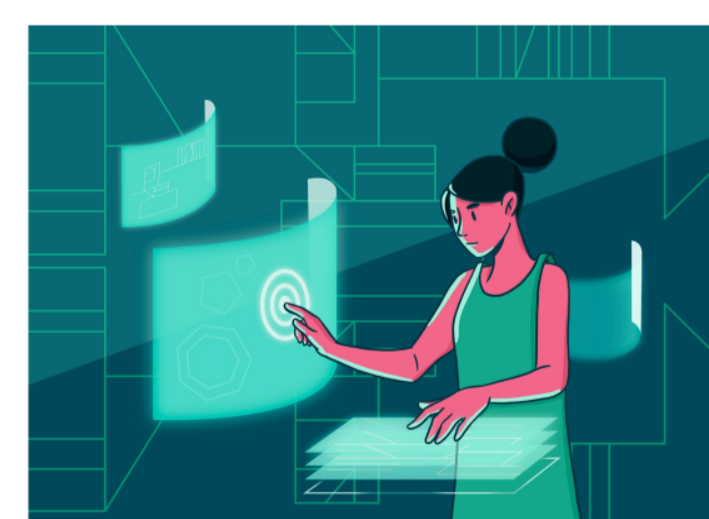
7 Focus Groups

- ✓ Instructors
- ✓ Sessional instructors
- ✓ Students
- ✓ CTE
- ✓ CEL
- ✓ IST/ITMS
- ✓ Faculty IT

Current State



First Phase Priorities within IST



- Classroom support
- New term onboarding for staff, faculty and students
- Intake process for support requests

- Goals:
- Consistency
 - Clarity/transparency
 - Efficiency

Improvements will be incremental and continuous and may go beyond IST



Some Activities to date:

Capturing Metrics:



- ✓ # of tickets by week
- ✓ Avg number of tickets per day
- ✓ # of tickets waiting on customer
- ✓ # of tickets by faculty

Classroom support:

- ✓ Enhanced knowledge base articles to provide additional online support.
- ✓ Enhanced start of term communication

Start of term support:

- ✓ Incorporated quick reference guide in new faculty training program and distributed it to a wide faculty audience
- ✓ Working with CTE to incorporate EdTech support options in training courses

Intake process:

- ✓ Current state mapped
- ✓ Pain points identified
- ✓ Future state mapping intake in progress

CI tools considered to create future state:

- ✓ Standardization to reduce variation
- ✓ Focus on end user needs
- ✓ Improve turnaround time
- ✓ Process efficiencies
- ✓ Prioritization matrix
- ✓ Value added focus

Elevate and Adapt: Continuous Improvement meets Project Management

Introduction

The Project Management Office (PMO) in the Office of the Vice-President for Finance and Administration at the University of Waterloo is committed to enhancing efficiency, effectiveness, and stakeholder satisfaction through applying continuous improvement to project management delivery. Highlighted are the continuous improvement initiatives undertaken by our PMO and the positive impact they have brought.

Key processes reviewed:

1. Peer to peer health check
2. Website changes and accessibility improvements
3. PM process review



Peer to Peer Health Check Process Enhancement

Problem:

- Cumbersome health check process
- Weeks to complete
- Not ideal for quick assessment

Approach:

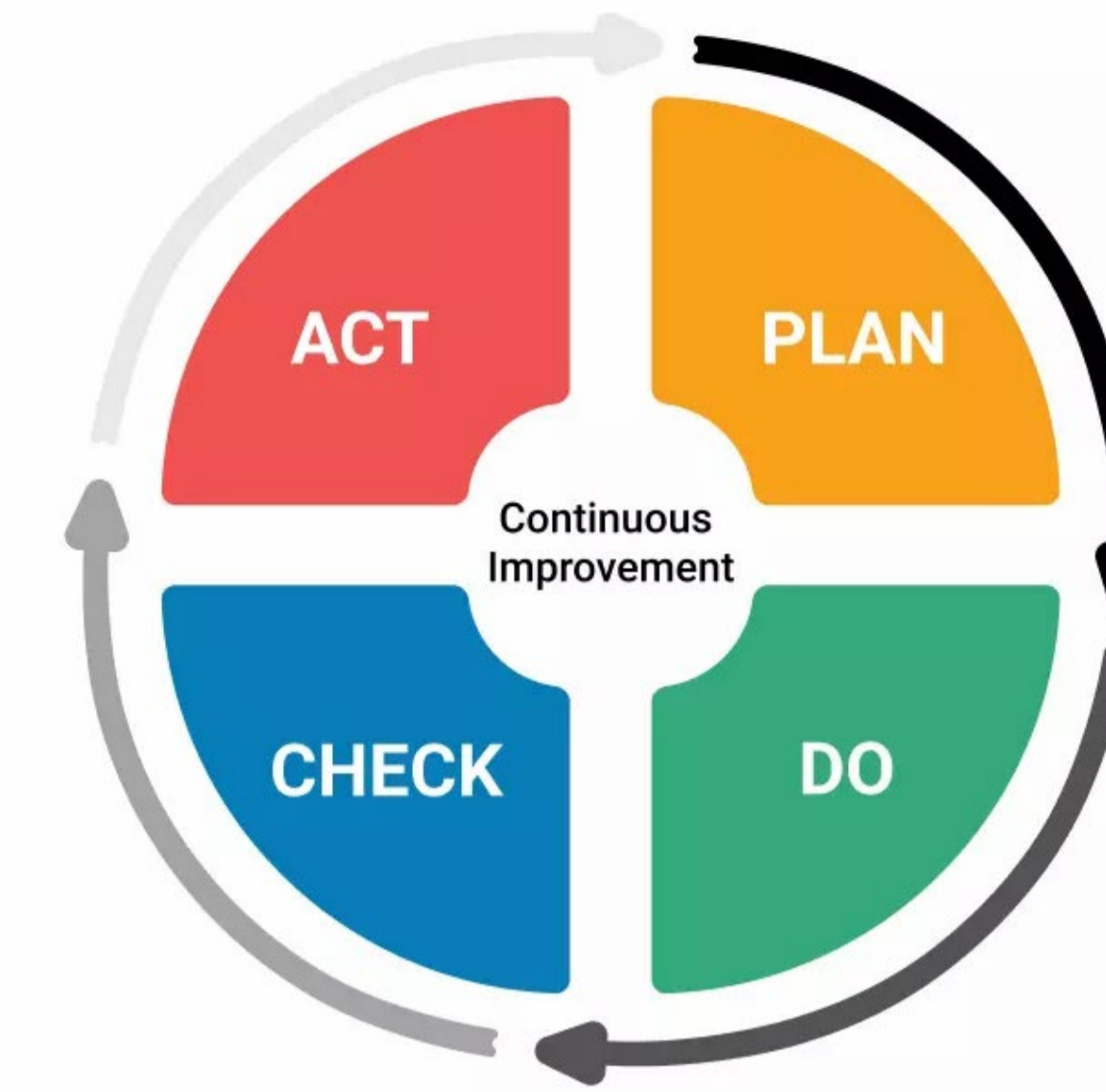
- Lean process improvement
- Agile adaptation

What we did:

- Streamlined questionnaire into three sections
- Implemented dropdown menus with automatic calculations
- Created user-friendly tool with immediate results and advice

Impact:

- Faster and easier to use
- Encourages more frequent health checks
- Improves project oversight and timely intervention



Website Changes and Accessibility Improvements

Background:

- PMO reorganization from IST to VPAF
- Digital accessibility compliance required by December 2024
- Build accessibility capability in PMO

What we did:

- Manual site audit
- Use of Siteimprove tool
- Ongoing monitoring

Impact:

- Achieved accessibility score of 88.6, surpassing the industry benchmark of 84.2*
- Continuous review for AODA compliance and accessibility best practices
- Enhanced user experience and inclusivity

*Canadian Higher Ed. benchmark

Project Management Process Review

Background:

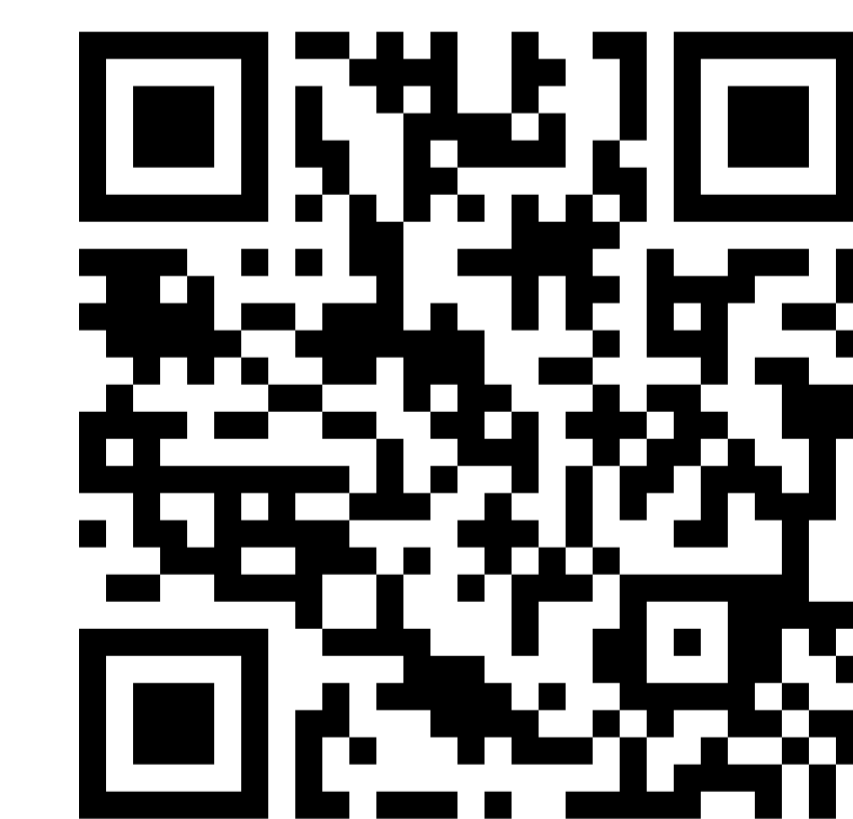
- Comprehensive review of processes, tools, and templates
- Aim to enhance PMO capability and meet enterprise-level standards

What we are doing:

- Assessing current processes, tools and templates
- Integrating change management principles
- Streamlining operations and improving efficiency

What's next:

- Plan and build future state
- Set metrics
- Try it out
- Review and update



PMO Hub



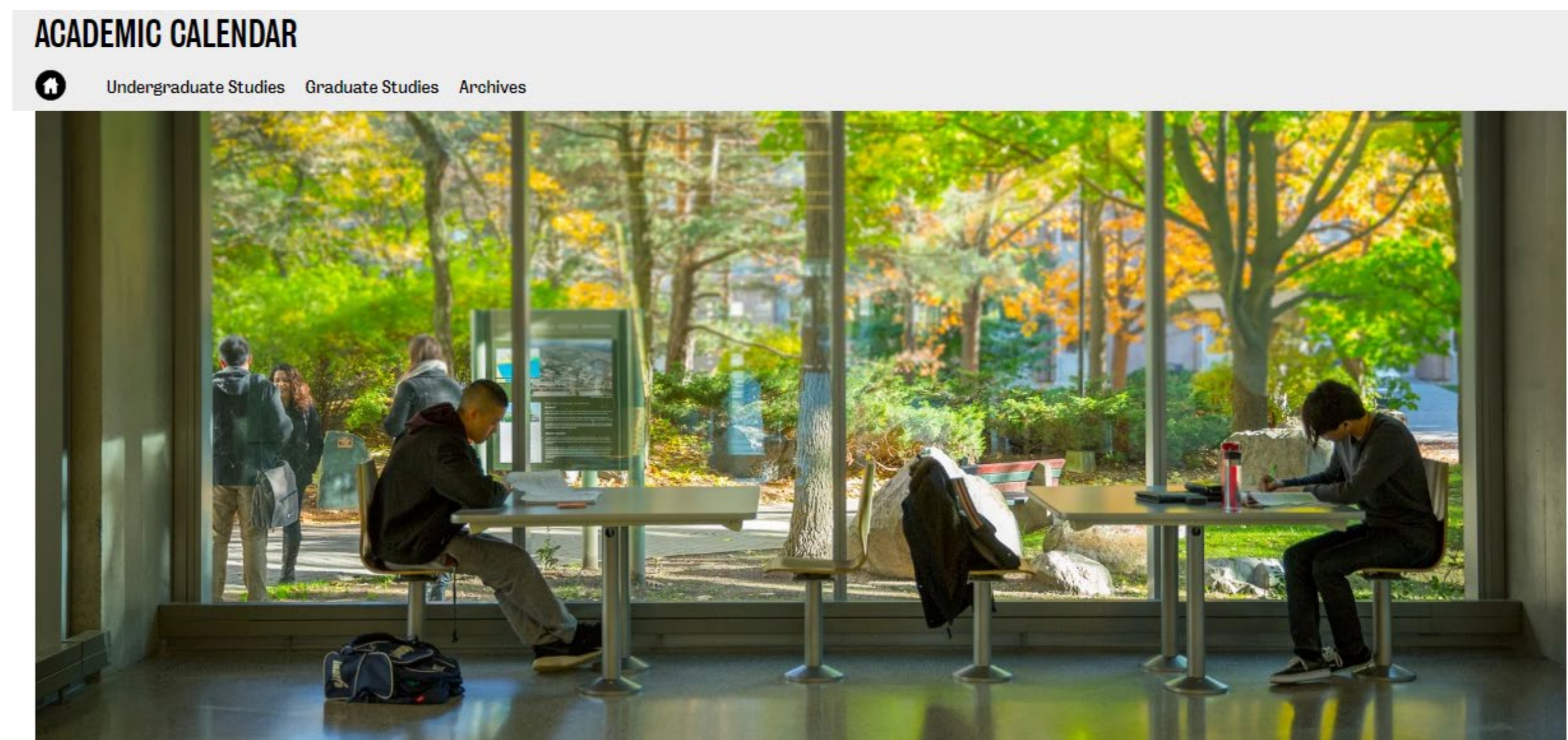
Health Check tool

Implementing a Campus-Wide Curriculum Management System

GOAL

Enhancing information management, workflow automation, and student experience

Kuali Curriculum Management is Waterloo's web-based solution to help campus navigate and streamline several unique curriculum management processes into one workflow that works for everyone and that publishes the Undergraduate Studies Academic Calendar.



Choose your Calendar



METHODOLOGY

Engagement of Change Champions

Awareness:

Curriculum staff were made aware of the importance of their role in the new system, helping them understand why the change was necessary.

Desire:

Early training focused on building a desire for change by getting them comfortable with the system, showing how it would benefit their daily processes, and helping to guide the transformation.

Stakeholder Involvement and Engagement

Knowledge:

Key stakeholders, such as associate deans and curriculum staff, were involved in vendor demos and cross-listed courses working groups to give them the knowledge required to support the system's implementation and develop institutional solutions.

Ability:

By involving them consistently, they gained the skills and tools to facilitate the system transition and address specific challenges related to the curriculum process.

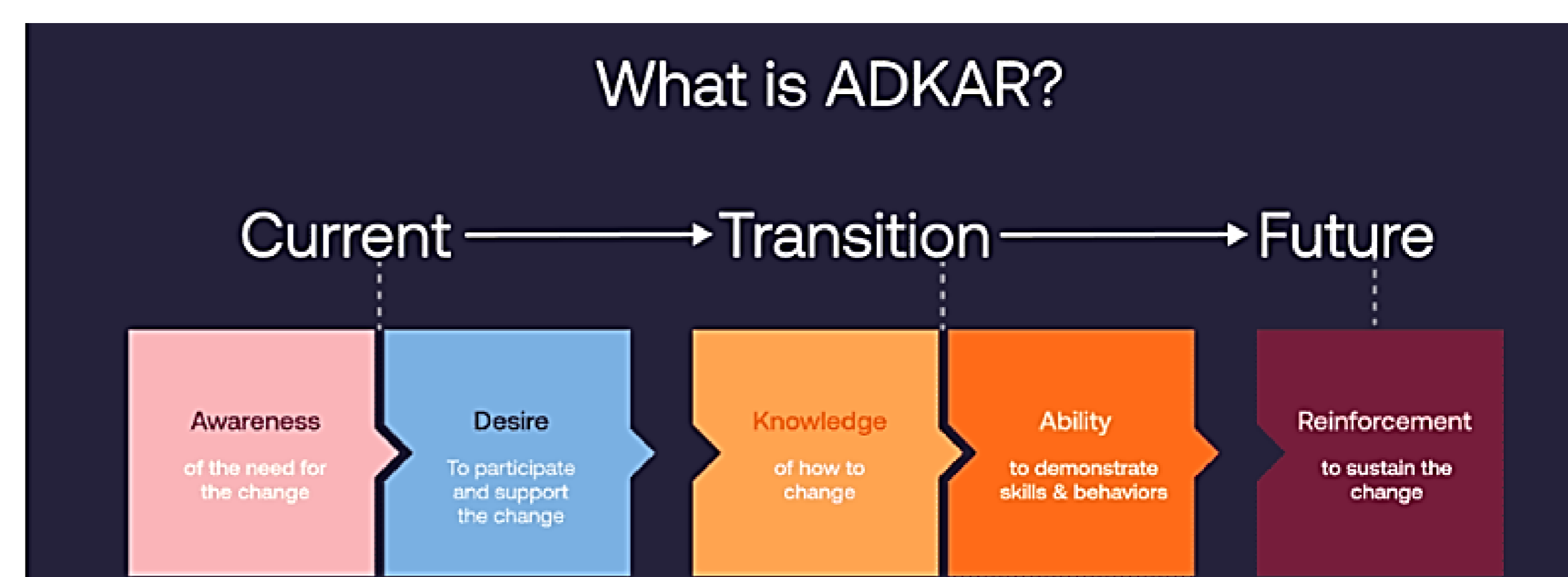
Leadership and Organizational Training

Ability:

Training sessions for early adopters, RO teams, and faculty members ensured participants had the ability to use the system effectively through practical, hands-on experience and access to resources like websites and training materials.

Reinforcement:

Continuous support through resources, dedicated communication channels (Teams) and validation sessions reinforced learning and ensured consistent engagement leading up to and after Go-Live.



Source: [The Whatfix Blog | Drive Digital Adoption](#)



UNIVERSITY OF
WATERLOO

Measuring impact to inform and improve process

Goal

To monitor, learn and adapt current and future projects based on information from many projects and data sources, considering differences in scope, timelines, criteria, complexity & stakeholders.

Power BI Dashboard

WR# & Project Name: 51779 New Lab
 Project Start: Tuesday, February 15, 2022
 Project Completion: Monday, September 30, 2024
 Worked Hours: 3.50
 Assigned Staff: Daniel Bugs

Approved Budget	Current Contract Commitment	Value of Changes	Total Spent to Date
\$5.47M	\$4.78M	\$287.81K	\$2.42M
Priority Rank	Number of Change Orders	Number of Contracts	2024/25 Actual GL
49	11	6	\$837.02K

Actuals - F2025 YTD vs Expected Total - F2025

Project Timeline

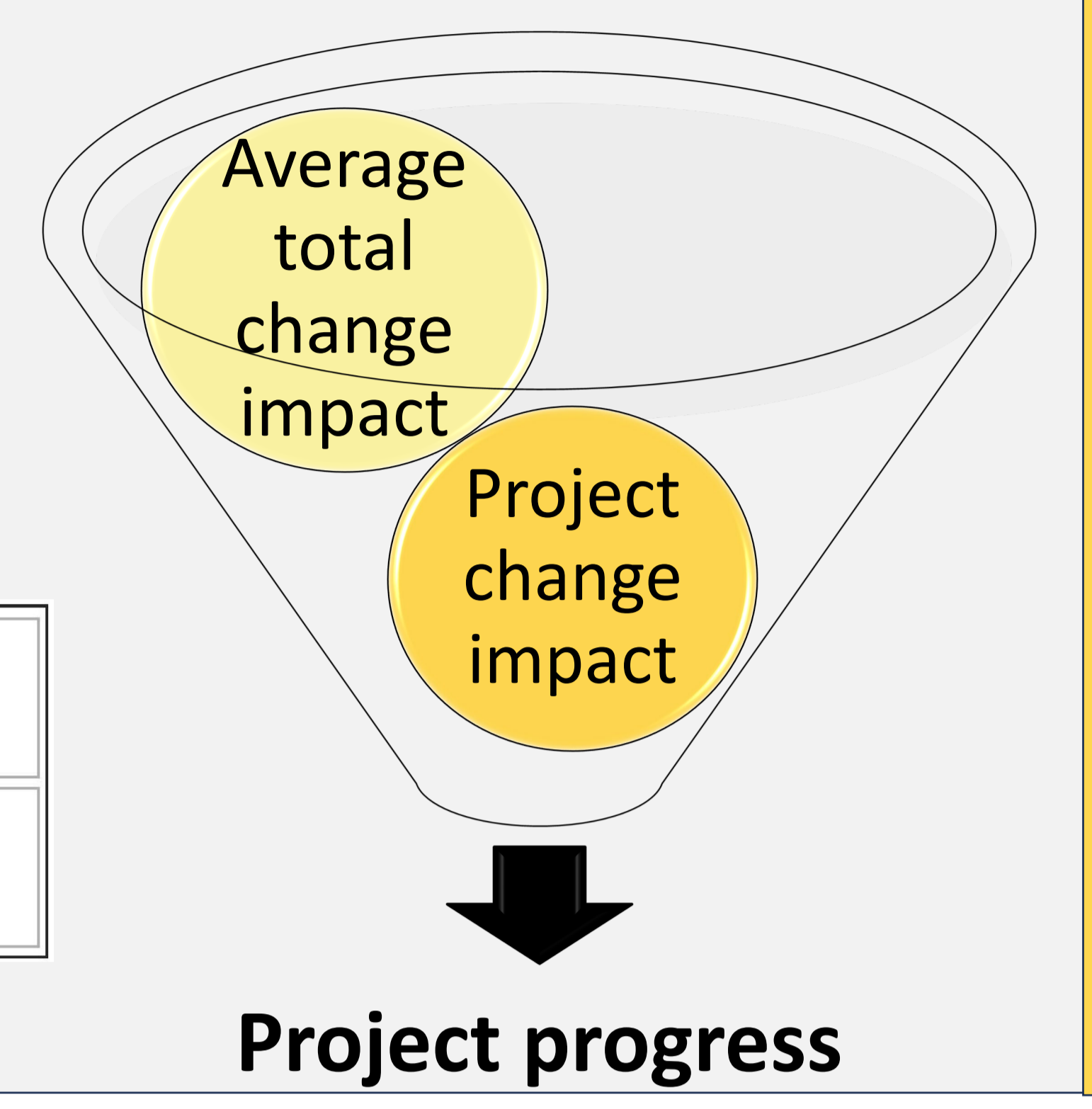
Contractor/Consultant	Phases	Hours Incurred
Access Environmental	Administration	1.00
Conestogo	Contract Admin	1.25
Harold Stecho Electric	Design	9.50
Smith + Andersen	Field Review/Coord	42.00
Sutherland	Project Implementation	28.50
WalterFedy	Project Planning	14.50
	Review	76.25
	Tender	19.00
		13.50
	Total	205.50

Budget, Commitment, Spend

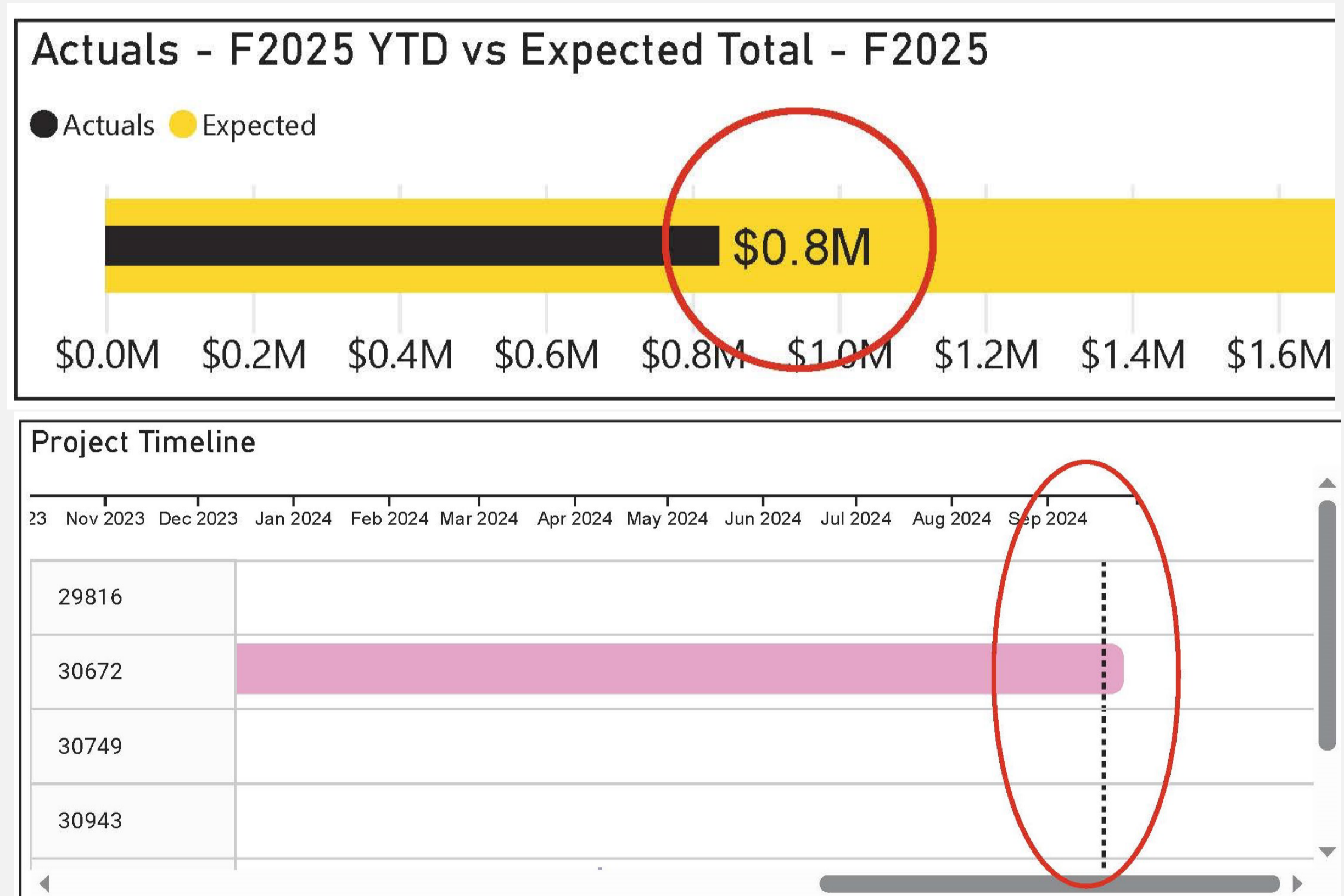
Are we trending in the right direction?

- Are # changes & cost is within expectation?
- Are adjustments to the contract within 10%?

Approved Budget	Current Contract Commitment	Value of Changes	Total Spent to Date
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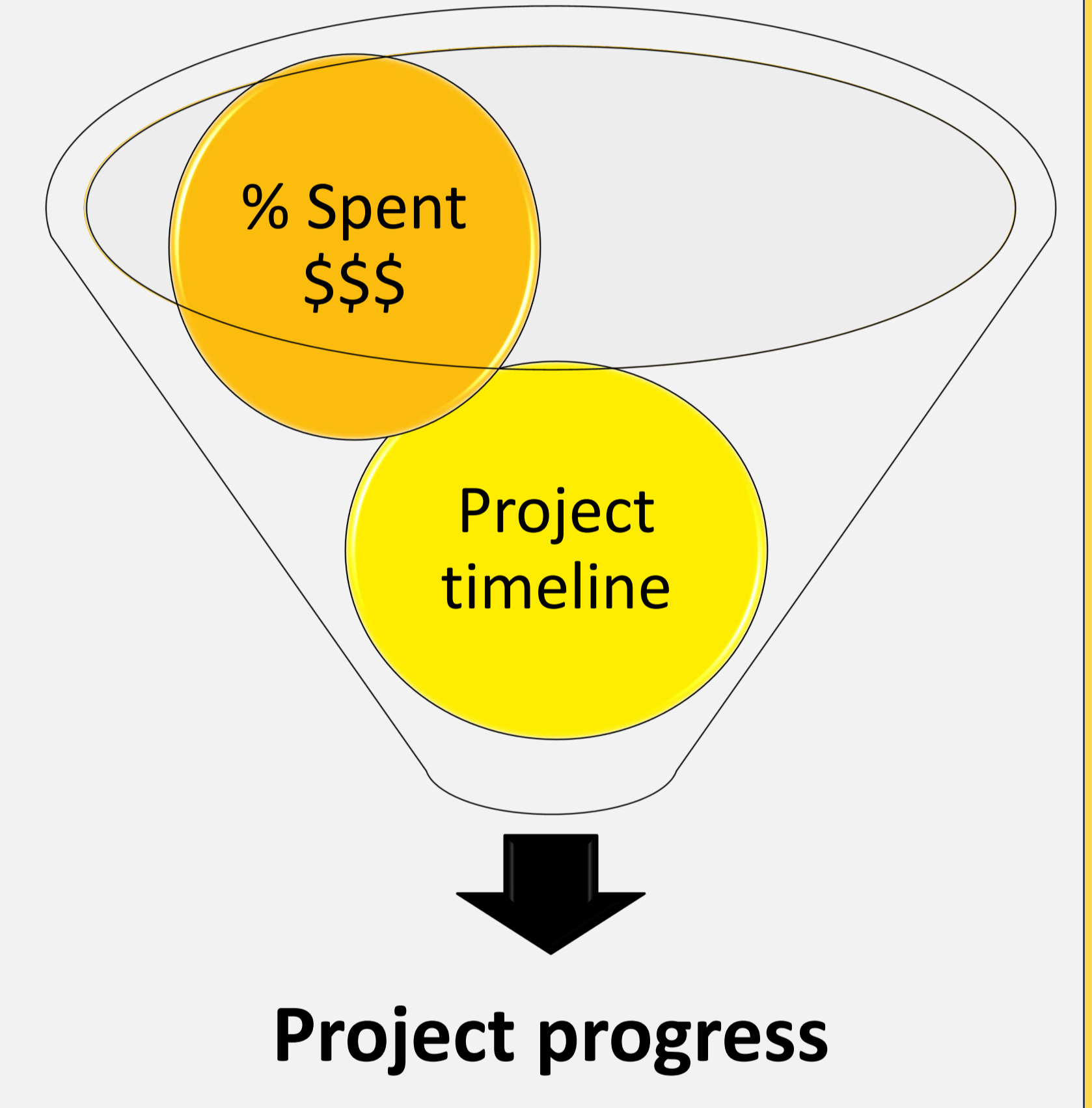


Timeline & Actual vs Expected \$ Total



Is the contract length in line with the predicted spending?

- No? There may be an issue with schedule or billing.
- Yes? Then we appear to be on track.



Challenges & Requirements

- Clear, easy to understand
- Convey project financial status, work completed to date, & team's impact
- Visualize project financials, schedule performance for tracking improvements & adjustments

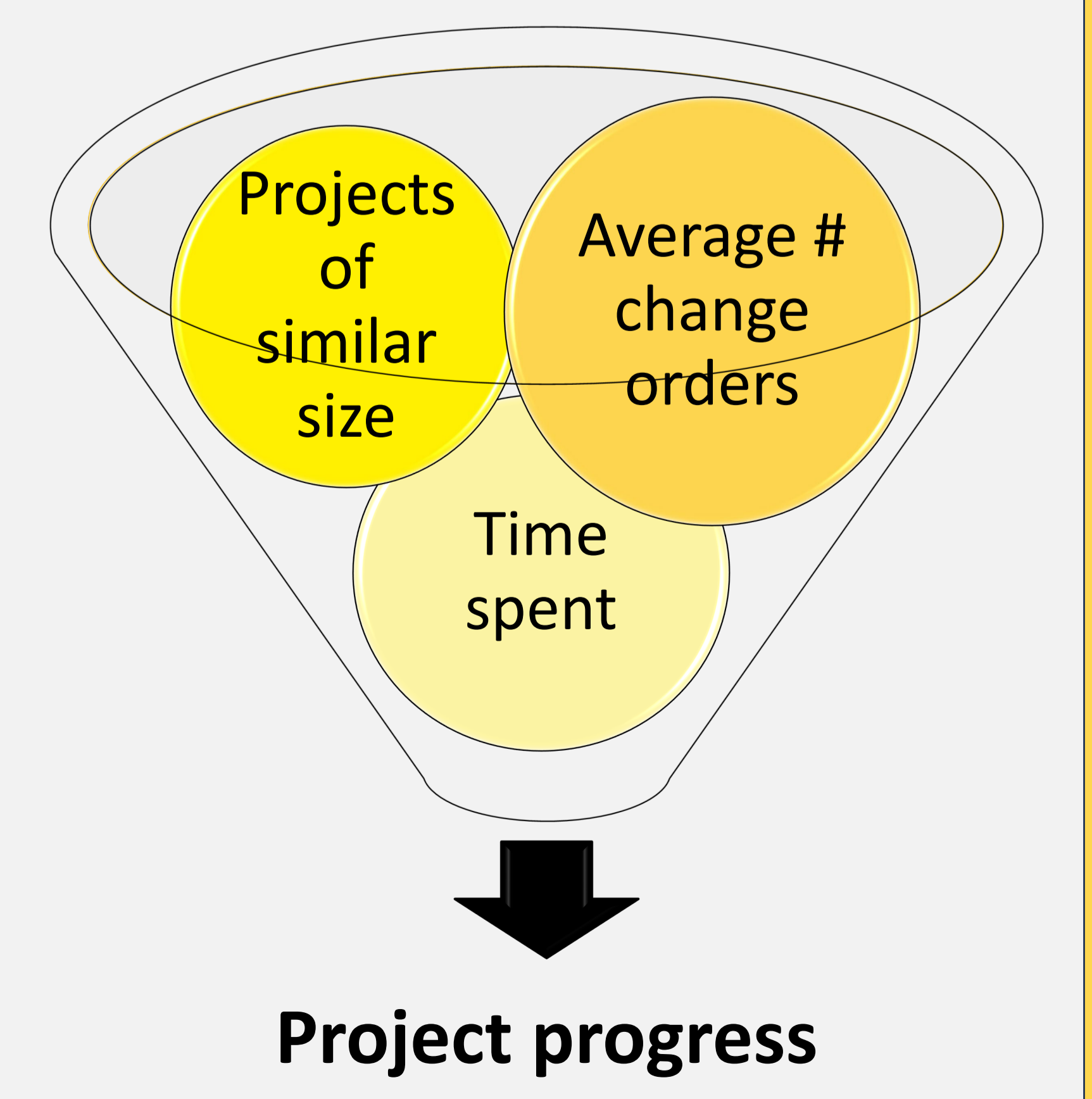
Team Commitments & Hours

Worked Hours: 3.50
 Assigned Staff: Daniel Bugs

205.50

Who has been involved, and how much?

- This helps us understand progress and complexity
- Have the right people been involved?
- Did our time increase suddenly?
- Did our team increase workload in a phase?



Understanding and Embracing Change in Accessible Education: Learnings from the Teaching Innovation Incubator

Accessible Education at UW

The University of Waterloo is currently creating and enacting plans to address the Postsecondary Education Standards and make our institution fully accessible to disabled learners. Of the many recommendations drafted to make our higher education system accessible, many specifically relate to teaching.

The newly established Teaching Innovation Incubator (TII) has been tasked with implementing these recommendations as part of the Accessible Education Project, which in turn will necessitate change to many instructors' teaching practices.

What is the Teaching Innovation Incubator?

The Teaching Innovation Incubator (TII) supports experimentation with bold teaching and learning ideas by bringing together talent, expertise, and - where appropriate - technology to serve as a hub, catalyst, and launch pad for the development of transformative teaching ideas at Waterloo.

The TII provides the following supports:

- brokering of connections for ideas, projects, and networking
- **project ideation support to help think through scope and proposal creation**
- project management to help plan and keep experimentation work on track
- **advisory input and resources to support project teams**
- expertise for regular, iterative evaluation
- **assistance with progressive educational spaces and technologies**
- ongoing communication and event management



Understanding and Embracing Change

Change is difficult.

Change to one's teaching practice can be even more difficult for various reasons (e.g., capacity; lack of training; adherence to disciplinary norms, etc.).

This project aims to bring about change that both respects user input but also gives instructors a starting point to remove some of the barriers to making teaching accessible.

- **User Testing Groups** for staff and instructors who have capacity and interest in accessibility
- Insight from **Disability Affinity Network** to hear directly from those impacted by these changes
- **Accessible Education Day (October 16 & 17)** to spread awareness of supports and rationale for these changes

Accessible Education Project

This project positions accessible education as a road to better teaching and learning for everyone, not merely a regulatory approval matter, and recognize that the disability community contributes to our diversity and re-imagining our teaching and learning approaches is required to fully include all identities.

Three project teams, co-led by faculty and staff, with cross-functional, interdisciplinary membership are leading the work, and addressing accessible education through its impact on:

- **Instructional programs & practices**
- **Learning tools & materials**
- **Institutional policies & guidelines**

Good teaching is accessible teaching



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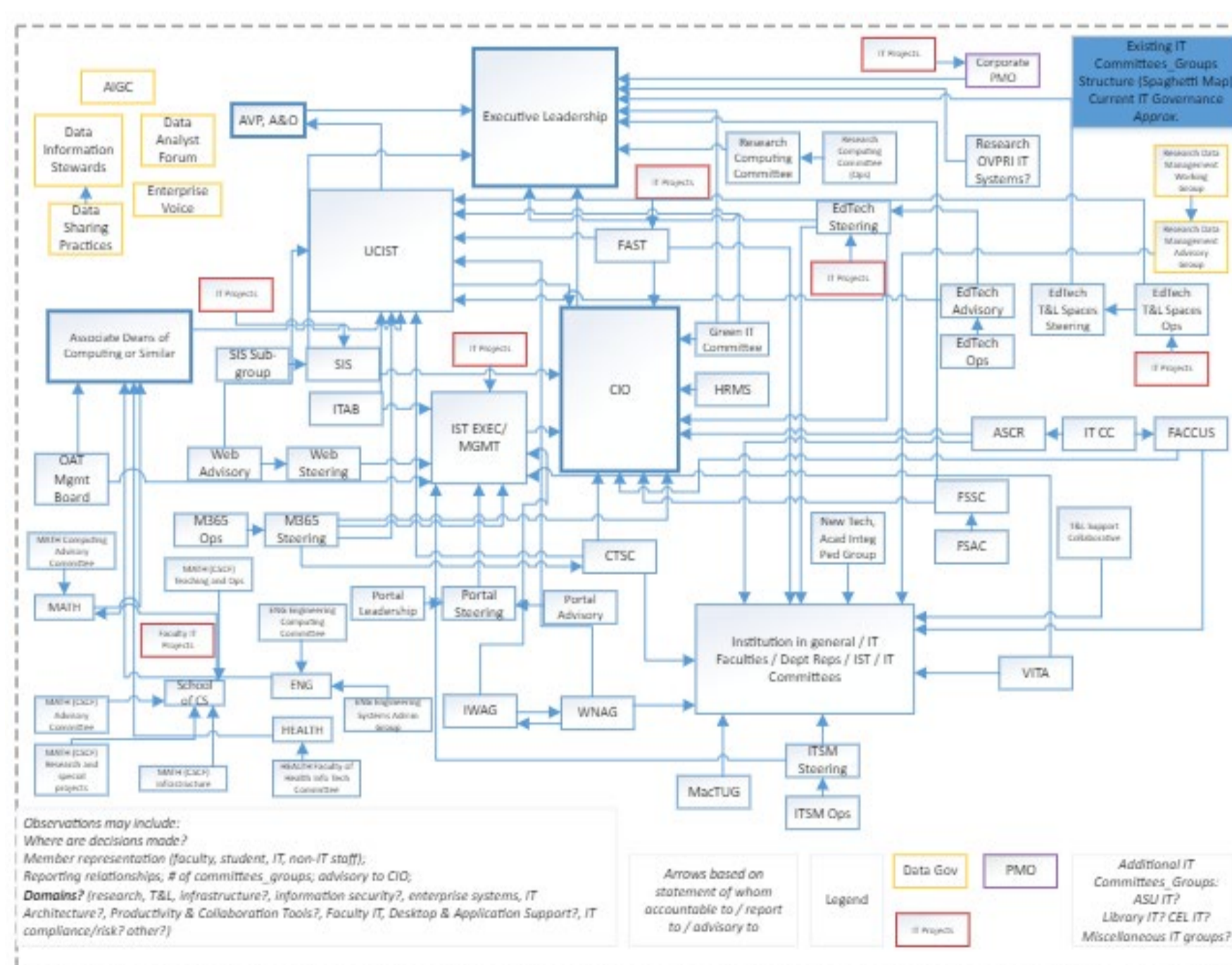
Refreshing IT Governance (ITG) at UW

A call for change...

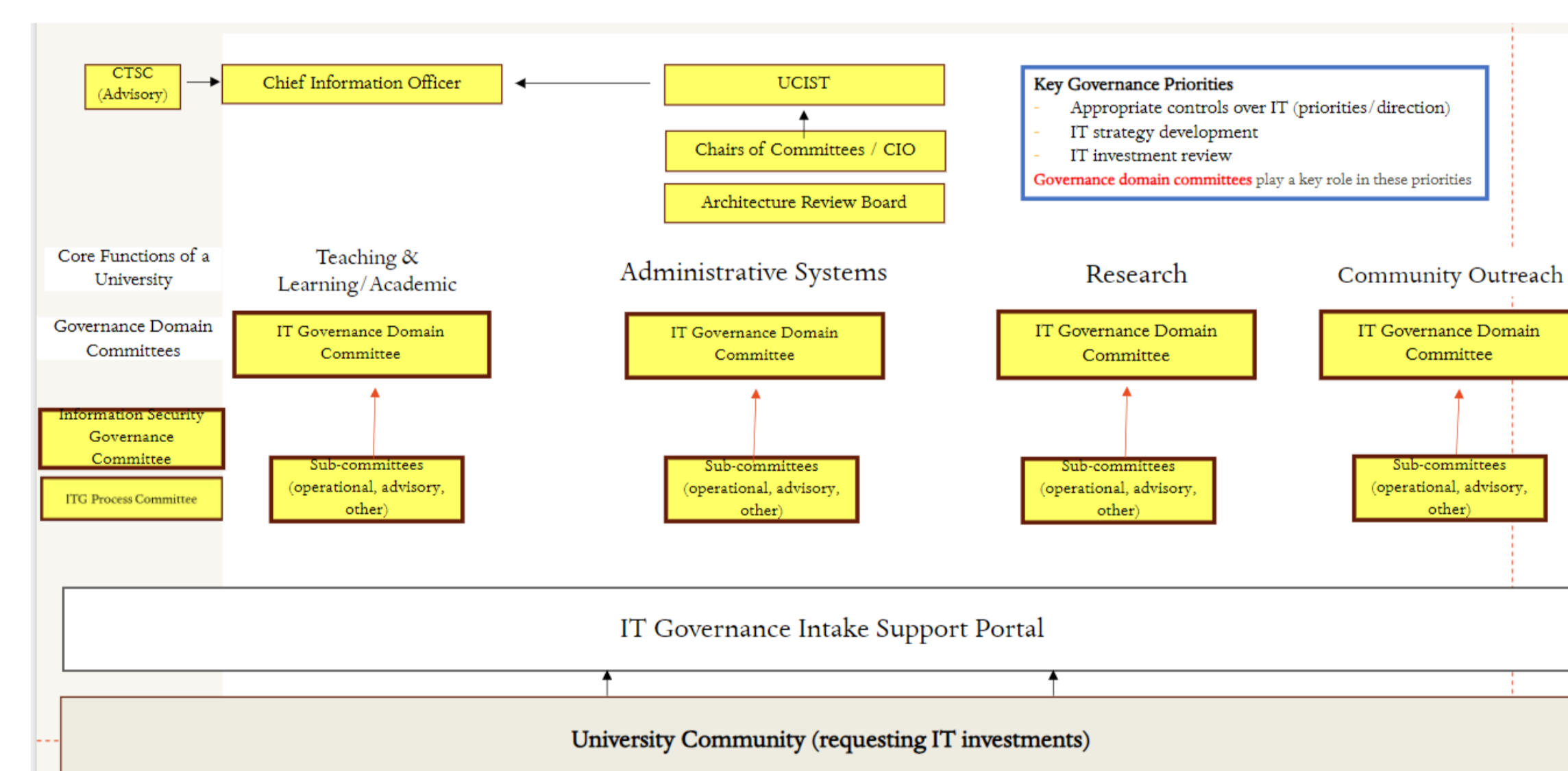
In the rapidly evolving technological landscape of the University of Waterloo, robust IT governance is essential for effective resource management, risk mitigation, and alignment with institutional goals.

In 2024, an 'IT Governance Recommendations Report' will provide a baseline proposal for the first iteration of IT governance. Through a process of change management, the new IT governance program will be slowly introduced to eventually create a dynamic, resilient, and efficient IT governance framework for years to come.

Current State



Future State?



What is the desired outcome for ITG v1?

IT governance (ITG) is designed to provide clear guidance and support to bring IT proposal ideas to life, ensuring transparency and inclusivity in decision-making and priorities across the UW community.

It establishes processes to support, develop, and prioritize these ideas, ensuring fair decisions on how to allocate IT resources.

ITG also links endorsement to IPB and funding approval, creating a streamlined path for efficiently launching projects.

What does IT Governance Provide?

- A framework for **effective decision making and priority setting** through sharing information, building consensus and collaboration

- Clarity and transparency on **university-wide IT decision-making authority** among centralized IT, faculties, ASUs

- Ability to identify and consolidate **common needs, resourcing and decisions that impact the overall cost of IT**

- A defining coherent IT roadmap of IT investments/proposals that **reduces duplication of systems, processes and data**

- Clarifies the **governance structure, terms of reference, membership, and roles and responsibilities of IT groups**

Change Methodology: Applying ADKAR

Awareness:

- Releasing an 'ITG Recommendations Report' to the IT community on what needs to be built to establish a centralized governance structure.

Desire:

- Sharing the vision of what ITG can provide.
- Involving an ITG working group to discuss components related to governance of IT.
- Engaging stakeholders to share directional ideas and build out design requirements.

Knowledge:

- Plan to provide workshops on ITG at UW and related benefits and processes.

Ability:

- Ensure a robust support intake model for IT proposals from idea to approval.

Reinforcement:

- Providing an ongoing feedback loop for continuous improvement of ITG along with the informational resources necessary to succeed in using the ITG framework.

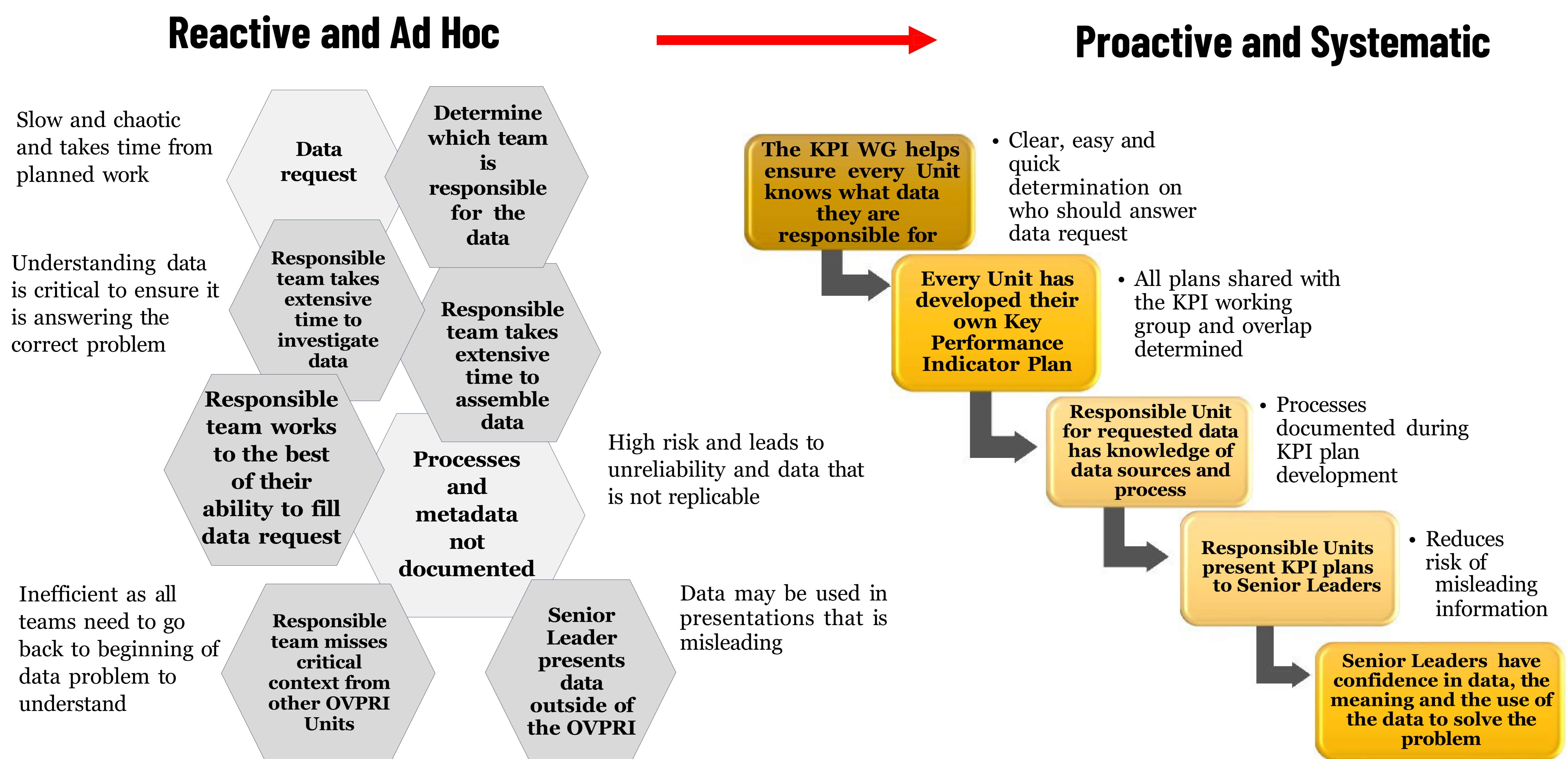
Implementing KPI Planning and Governance

Problem Statement

- ❖ Data can be misleading when the wrong data is used to answer a question.
- ❖ Not having time to document data architecture such as process steps and metadata as well as to understand important context from other Units can result in confusion and make the data almost meaningless in its totality.

Office of the Vice-President Research and International (OVPRI)

An Iterative Approach to KPI Planning and Governance: the KPI Working Group Governance Structure



Who is on the KPI Working Group (WG)?

- Internal OVPRI Teams = Are Standing Committee Members
- External OVPRI Collaborators = Are Expert Committee Members across the University

What does the KPI WG Do?

- Uses the approach described above to provide relevant, robust and replicable data to external stakeholders.

Key Tools and Processes

- Common definitions, e.g. What is a KPI?
- Standardized KPI template \ Data Dictionary
- KPI catalogue
- Committee meetings for KPI review and development
- Standardized approach to KPI conversations with partners
- Establish frequent reviews
- Promote use of existing, common KPIs above unique KPIs

The Path Forward

- Continue the monthly KPI Working Group meetings
- Assist all OVPRI Units in trouble shooting KPIs that they have developed or will develop
- Develop a website with our data/KPI planning and Governance framework

A continuous improvement initiative within the OVPRI

Adopting a Departmental Portfolio Management Strategy

Developing processes for the planning and delivery of unit-wide goals and objective

Problem Summary:

Prior to this year, the Centre for Work-integrated Learning (WIL) department did not employ a comprehensive portfolio management strategy or processes to enable such a strategy.

As an example, though we set strategic goals, we didn't map the specific actions/projects required to achieve those goals, were missing connections/interdependencies amongst the projects, and we did not we define clear outputs and outcomes to measure success.

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What is portfolio management?

Portfolio management is the coordinated management of one or more portfolios to achieve organizational strategies and objectives.

Effective portfolio management

- aligns with the unit's strategic direction (i.e., strategic goals)
- makes the best use of limited resources
- builds synergies between projects and other areas of work
- allows for measurement of the unit's portfolio management goals
- enables leadership to make efficient, effective decisions
- increases the likelihood for completion and success of the unit's goals

Right-sizing the solution

Good project and portfolio management calls for the use of the tools and methodology that are tailored to the needs and characteristics of the organization. The design of new processes were built with agility and growth in mind.

Set goals as a group

- As a management/leadership group, create unit goals for the year
- Consider organizing a strategy meeting/retreat to accomplish this work

Map goals to existing Strategic Plans

- Creates strategic alignment
- Emphasizes the importance of your unit's goals and creates buy-in
- University Strategic Plan 2020-25
- Indigenous Strategic Plan 2023-28

Prioritize your goals and actions

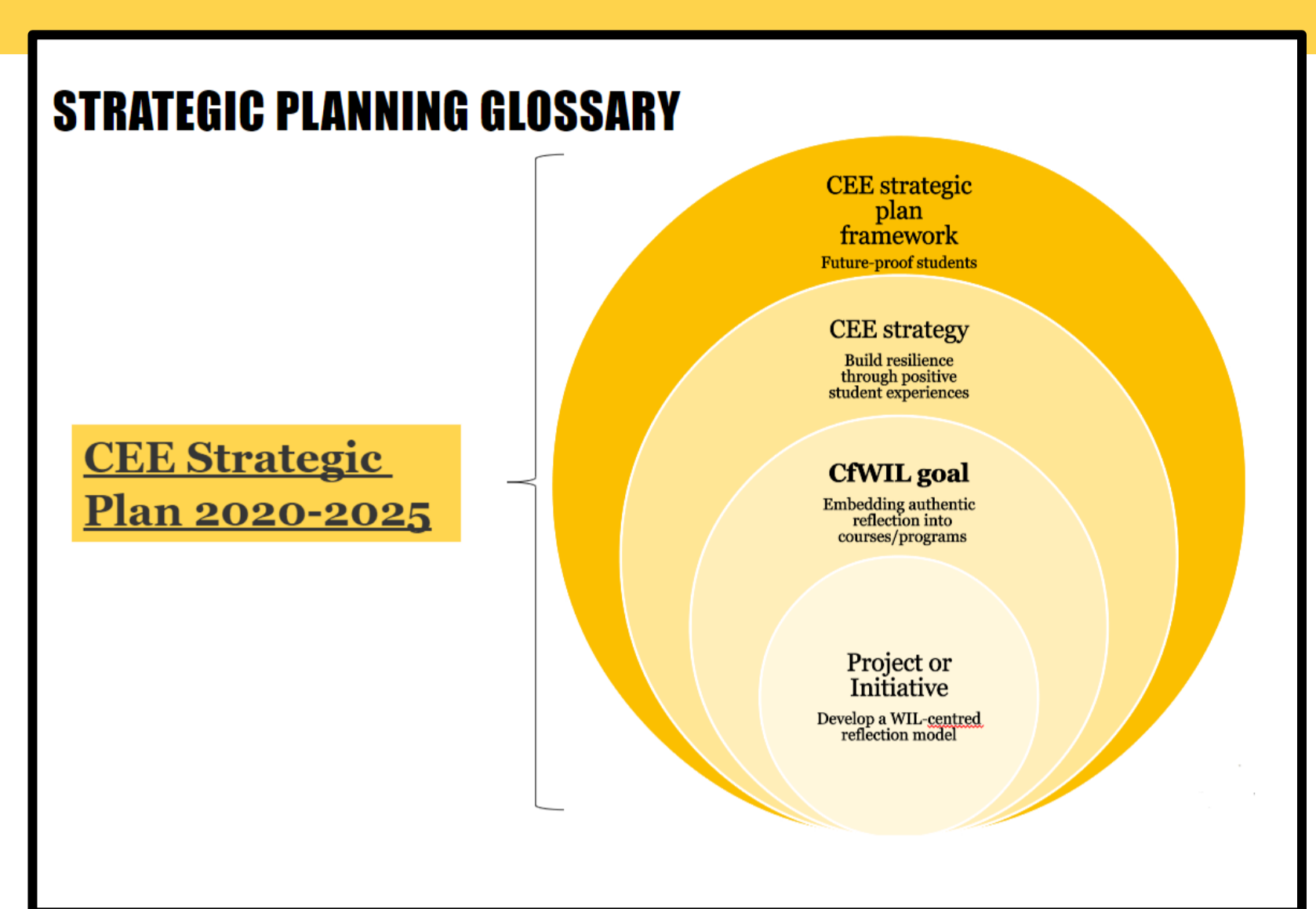
- Adopt a method to identify "high value" goals and actions
- A prioritization scale creates clarity and ensures top priorities are resourced appropriately

Track and share your progress

- Use a tool to track goal progression
- Share regular updates and celebrate accomplishments with the team

Sample prioritization scale

1. Top priority
2. Important & must keep moving but not a 1
3. If time permits



Change management: Lessons learned

- Provide clear rationale and benefits to those affected by the change
- Provide opportunities for questions and feedback gathering
- Introduce changes at a realistic pace
- Be present when people "try" the change – you'll learn a lot!
- Conduct regularly check-ins: see how people are feeling about the change and be responsive to their feedback
- Leverage existing processes and systems to ease and support the change
- Celebrate the accomplishments and acknowledge those who helped you get there

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Using Project Management as a Mechanism for Inclusion: The VPRI's President's Anti-Racism Taskforce (PART) Program

Implementing Systemic Change within UW's Research Ecosystem

Following the world events of 2020, the University launched the President's Anti-Racism Taskforce (PART). With around 88 recommendations, the Vice-President of Research and International is tasked with implementing 9 of these recommendations with hopes of creating a more equitable and inclusive research ecosystem.

Implementing systemic change is not easy, but using project management tools has helped along the way.

The Challenge: Tacking the Triple Constraint

Budget | Scope | Time

Equity projects and projects that seek to facilitate social change are often considered side-of-desk work and difficult to implement long term due to many different factors. To tackle this triple constraint, it is important to develop...

Accountable leads

Responsibilities

Strong project sponsor(s) to advocate for the project and facilitate warm welcomes

Strong business case

Community-based decision making

Communications plan

Strategic planning and clear critical path

Lots of creativity!



A Clear Path Forward: Mechanisms of Change

While it is important to remain agile to have community informed projects, it is important to use project management tools to drive your project forward, sustainability of your project, and for the outcome to be 'business as usual'. A few examples that we have used in PART projects are...

- Building solid project infrastructure (e.g., using MS Teams to keep your project in one place)
- Grounding projects in our Risk Register (e.g., the risk of overburdening community members)
- Developing thoughtful impact indicators to demonstrate your business case
- Communications planning specific to each collaborator

Creativity, Compassion, Care: Leveraging your Institutional Environment

Inclusive project management takes a lot of creativity. The VPRI's PART Program has leveraged several mechanisms and change in the institutional environment to advance projects. Here are a few examples!

- Using the office community to provide feedback on our Indigenous Research Survey
- Project sponsor provided Working Group Members allotted hours in their workday to dedicate to PART projects
- Consistent socialization of deliverables at every level of collaboration
- Robust external community engagement sessions to guide project decisions

"Slowly, Together, with Enthusiasm..."

- Sara Anderson, Senior Manager, Indigenous Research



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Becoming a

SMOKE-FREE CAMPUS



Applying P3 at the enterprise level

On July 1, 2024, the University of Waterloo joined over 100 universities and colleges in adopting a smoke-free policy.

Becoming a smoke-free campus (including, tobacco, cannabis, and vaping) is part of the University's ongoing efforts to foster a healthy and safe campus environment for all. Further, providing a smoke-free environment strengthens our commitment to the Okanagan Charter: An International Charter for Health Promoting Universities and Colleges, where it is our responsibility to create environments where health is embedded into campus culture and policy.



People

Impacted: All employees (Faculty, Staff, Union), students, visitors, retirees.

Internal groups: President, Executive Council, Secretariat, Campus Wellness, Facilities, Special Constable Services, Office of Indigenous Relations, CUPE, Staff Relations Committee, Faculty Relations Committee, Executive Council, UG and GRD committees, Affiliated and Federated Institutions of Waterloo, Satellite campuses, North Campus.

External groups: Public Health, Region of Waterloo, Cities of Cambridge, Kitchener, Waterloo, Hydro and Post-Secondary Institutions across Ontario.

The CM Approach

1. Research
2. Inform & engage
3. Communicate
4. Train
5. Implement
6. Reinforce

Tools

ADKAR, Stakeholder Matrix, Sizing the change tool, change plan, communication plan, training plan

Output:

- ✓ Clarity regarding what is changing
- ✓ Tailored communications
- ✓ Improved decision making
- ✓ Tailored approaches
- ✓ Delivered smoking cessation support sessions
- ✓ Usage of Designated Smoking Areas
- ✓ Post implementation adjustments

Process

Activities:

- Current state assessment (including post-secondary environmental scan)
- Future state vision
- Signage (internal and external)

Tools

- Kanban board
- Teams Channel (organization)
- OneNote (tracking, recording, organization)



Output:

- ✓ Defined future state
- ✓ Efficient actions
- ✓ Effective teamwork
- ✓ Reduced waste
- ✓ Employee satisfaction

Project

Scope: University of Waterloo, Satellite Campuses and AFIW (indirectly)

Project Phase

Initiation

Step 1: Project governance / Pre-read, research (SFOA, Cannabis Act), stakeholder register, planning Policy development

Step 2: Policy approval, signage development, communication planning

Planning

Status updates to project team members, meeting minutes, updates to planning documents

Execution

Step 3: Installation of signage, training delivery, implementation

Step 4: DSA removal (April 30, 2025) and data collection

Closure

Lessons learned, closure report

Output Steps 1 → 3:

- ✓ Clarity over roles and responsibilities
- ✓ Clarity over scope
- ✓ Activity reports
- ✓ Project deliverables
- ✓ Completion of Phases on time, in scope and in budget



LEARN MORE AT

uwaterloo.ca/smoke-free

Smokefree@uwaterloo.ca | Samantha Murray | Robbyn Hesch

People, Process, and Projects Community of Practice Showcase

The Project Management and Product Delivery Life Cycle

What is the definition of a project? "A project is a temporary endeavour undertaken to create a unique product, service or result "(PMI)

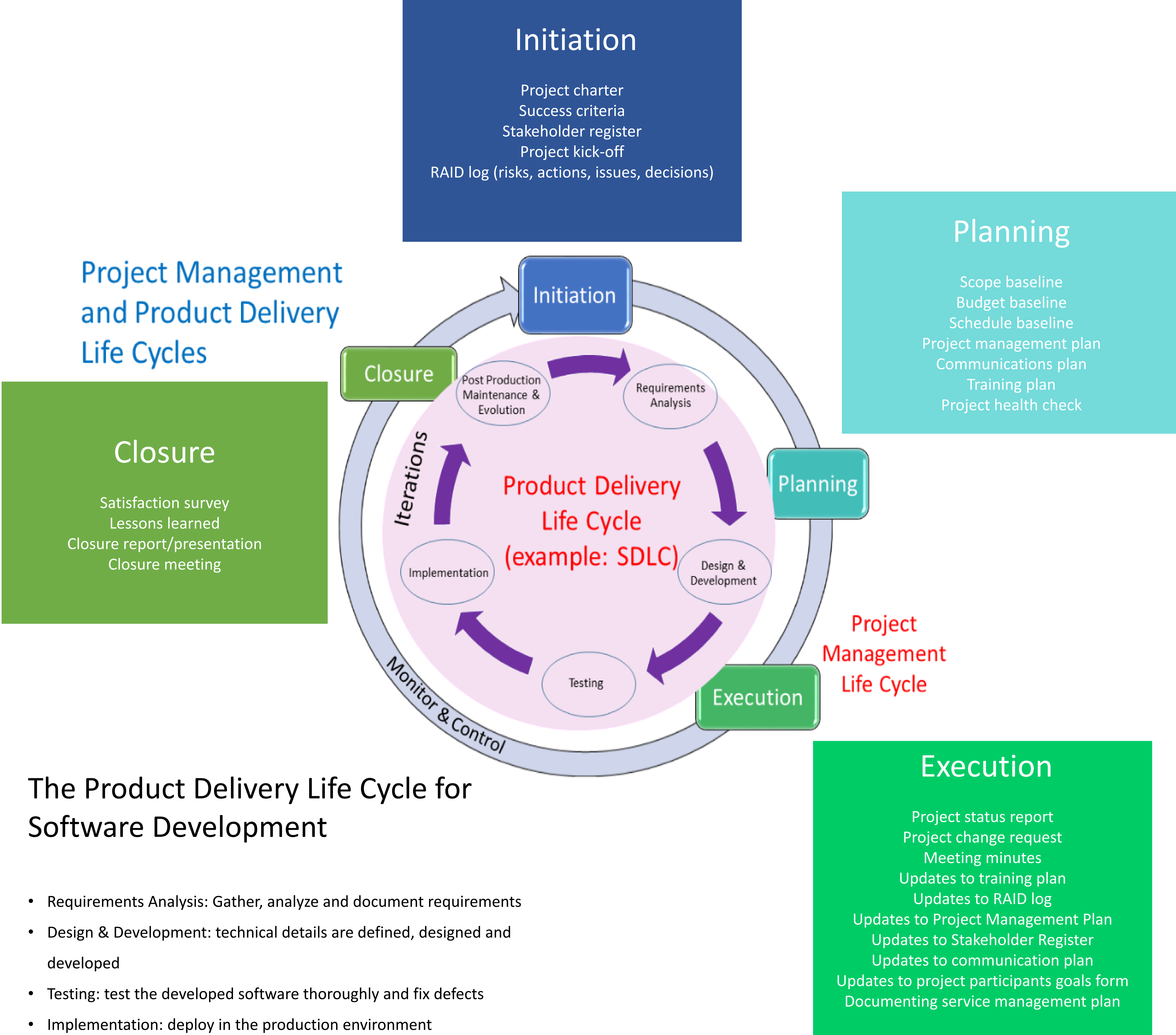
What are the related criteria for a project?

- Finite: has specific start and end dates
- Unique: distinct from change management or operational maintenance with repetitive tasks or objectives
- Specific: intended to meet measurable, isolated, unique set of objectives
- Adequate: has adequate scope of work and resources that would benefit from project management tools and techniques

Do you have a project or product you are working on that would benefit from using the project life cycle phases or product life cycle iterations?



Project Management and Product Delivery Life Cycles



Towards Inclusive Innovation at the University of Waterloo

Our goal is to build an **equitable and inclusive innovation ecosystem** that removes barriers and ensures the broadest range of participation in industry partnerships, commercialization, and entrepreneurship.

Opportunity for Change

Through consultations, several barriers were identified, particularly for equity-deserving groups. There are significant opportunities to expand support, enhance accessibility, and focus on ways to ensure inclusiveness of environments for our diverse population of students, staff, and faculty interested in innovation.

Our three-stage approach:

- 1. Knowing:** Spreading awareness and measuring the current state of inclusivity.
- 2. Doing:** Increasing access, equity, and inclusivity through training, internal grants, and incentives for inclusive activities.
- 3. Sustaining:** Demonstrating the impact of our efforts through ongoing research and evaluation, driving systemic change.



Photo from Unsplash (unsplash.com)



Photo from Unsplash (unsplash.com)

SAMPLE ENGAGEMENT

To enable "KNOWING" and "DOING," our office is developing and delivering inclusive innovation workshops.

Here, participants discuss and work through cases based on real entrepreneur experiences to build cross-cultural competencies and alternative conflict resolution strategies.

Reach out to participate!

Strategic Pillars

Build and Sustain a Diverse Innovation Community

Work with equity-deserving communities and innovators to assess community needs, apply an inclusive lens to processes, and streamline access to essential supports like mentors and funding opportunities.

Support Inclusive and Respectful Environments

Develop resources, enhance communication channels, and establish feedback systems for individuals engaged in innovation spaces to safely and honestly share their experiences and suggestions.

Advancing Support for Innovation Leaders

Creating training to support faculty and staff in creating inclusive environments, establish an Inclusive Innovation advisory committee to guide our work towards Inclusive Innovation priority areas.

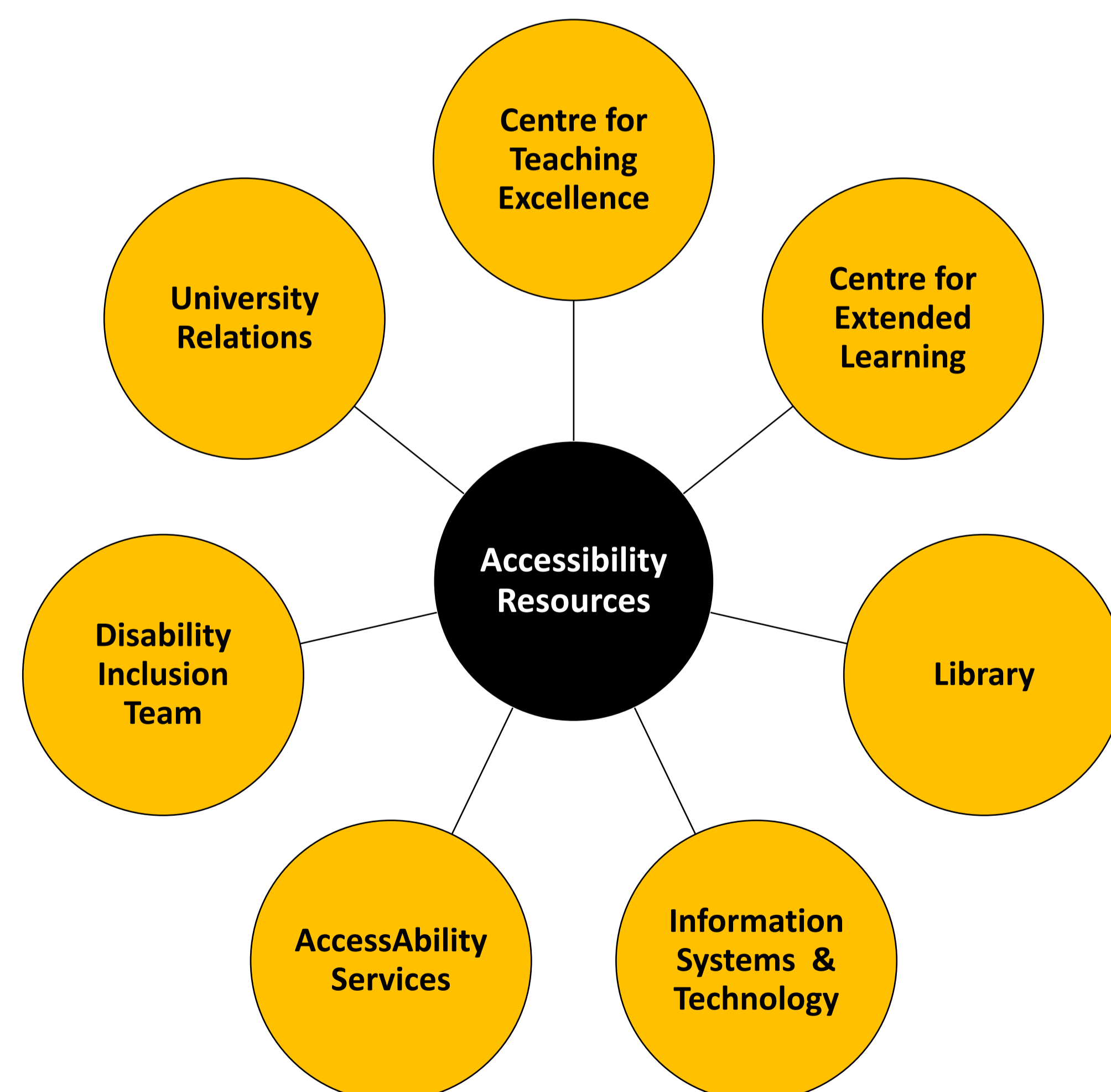


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Course Accessibility: A Small Steps Approach Using the Postsecondary Course Accessibility Guide (PCAG)

Current Situation

- Course-level accessibility requirements are not clearly defined
- Navigating Waterloo's landscape of accessibility resources is challenging
- There are multiple demands on instructors
- There are 185 recommendations in the proposed Postsecondary Accessibility Standards



Change Management Tool & Methodologies

Postsecondary Course
Accessibility Guide



A Small Steps Approach

Individually



1

- Download the fillable Guide and select the section that best matches where you are in your course design or delivery.

2

- This term, identify 1 or 2 accessibility gaps to address in one or more courses.
- Refer to the How-to section of the PCAG Reference Manual
- Contact the Agile Development Team (Centre for Extended Learning) for help when needed.

3

- Next term, repeat steps 1 and 2 for one or more courses.

In Groups



Use the downloadable, fillable Guide to review course accessibility in a facilitated, hands-on working session with accessibility specialists available to support as needed.

Next Steps

- DEVELOP a Waterloo-specific version of the PCAG
- ALIGN the small steps approach with emerging accessibility training initiatives to support continuous improvement
- LEVERAGE existing groups and resources
 - Teaching Fellows
 - Teaching Innovation Incubator
 - Academic support units
- EXPLORE discipline-specific accessibility supports to supplement the PCAG

Download the Guide



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Centre for Extended Learning