

**University of Waterloo
STAFF RELATIONS COMMITTEE
Notice of Meeting**

DATE: Monday, 6 March 2023
TIME: 1:00 p.m. – 2:30 p.m.
PLACE: Teams Videoconference

Chair: Agata Jagielska

OPEN AGENDA

- | | |
|---|-------------|
| 1. Declarations of Conflict of Interest | Information |
| 2. Approval of Minutes [Open Session] of the 26 January 2023 and 9 February 2023 Meetings* and Business Arising | Decision |
| 3. Other Business | |

Next Meetings: 23 March 2023 Organizational Changes Meeting; 6 April 2023 Business Meeting

*attached **to be attached

28 February 2023

Sarah Willey-Thomas
Associate University Secretary

University of Waterloo
STAFF RELATIONS COMMITTEE
Minutes of the 26 January 2023 Meeting

Present: Kathy Becker (for Dave McDougall), Courtney Bremer, Priscila Carrara, Yessenia Guerrero, Lisa Habel (for Steve Bradley), Michelle Hollis (co-chair), Lee Hornberger, Agata Jagielska (co-chair), Cathy Newell Kelly, Sara Perkins, Sarah Willey-Thomas (secretary)

Regrets: Sheila Ager, James Rush, Kate Windsor

Organization of Meeting: Agata Jagielska, co-chair of the committee, took the chair, and Sarah Willey-Thomas acted as secretary. The secretary advised that a quorum was present. The agenda was accepted as distributed.

OPEN AGENDA

1. APPROVAL OF MINUTES OF THE 8 DECEMBER 2022 MEETING AND BUSINESS ARISING

The minutes of the 8 December 2022 meeting were approved as presented. Hollis and Hornberger. Carried unanimously.

2. OTHER BUSINESS

There was no other business.

13 February 2023

Sarah Willey-Thomas
Associate University Secretary

**University of Waterloo
STAFF RELATIONS COMMITTEE
Minutes of the 9 February 2023 Meeting**

Present: Kathy Becker (for Dave McDougall), Steve Bradley, Courtney Bremer, Priscila Carrara, Yessenia Guerrero, Michelle Hollis (co-chair), Lee Hornberger, Agata Jagielska (co-chair), Cathy Newell Kelly, Sara Perkins, Sarah Willey-Thomas (secretary), Kate Windsor

Regrets: Sheila Ager, Lisa Habel (alternate), James Rush

Organization of Meeting: Michelle Hollis, co-chair of the committee, took the chair, and Sarah Willey-Thomas acted as secretary. The secretary advised that a quorum was present. The agenda was accepted as distributed.

OPEN AGENDA

1. DECLARATION OF CONFLICT OF INTEREST

2. APPROVAL OF MINUTES OF THE 12 JANUARY 2023 MEETING AND BUSINESS ARISING

The minutes of the 12 January 2023 meeting were approved as presented. Jagielska and Becker. Carried unanimously.

3. OTHER BUSINESS

There was no other business.

13 February 2023

Sarah Willey-Thomas
Associate University Secretary

**University of Waterloo
STAFF RELATIONS COMMITTEE
Notice of Meeting**

DATE: Monday, 6 March 2023
TIME: 1:00 p.m. – 2:30 p.m.
PLACE: Teams Videoconference

Chair: Agata Jagielska

CONFIDENTIAL AGENDA

- | | |
|---|-------------|
| 4. Declarations of Conflict of Interest | Information |
| 5. Approval of Minutes [Confidential Session] of the 26 January 2023 and 9 February 2023 Meetings* and Business Arising | Decision |
| 6. Organizational Changes (Michelle Hollis)* | |
| a. Associate Vice-President Indigenous Relations | Information |
| b. Co-Operative and Experiential Education (Centre for WIL and Work-Learn Institute) | Information |
| c. Co-operative and Experiential Education – Co-op Services | Information |
| d. Centre for Ocular Research & Education (CORE) | Information |
| e. Cybersecurity and Privacy Institute (CPI) | Information |
| f. Library, Circulation Services Department | Information |
| g. Print + Retail Solutions (P+RS) | Information |
| h. School of Accounting and Finance | Information |
| i. Dean of Science Office | Information |
| 7. Policy 12 – Feedback Summary** (Chair) | Decision |
| 8. Parking Update (Elias and Rumpel) | Information |
| 9. Other Business | |

Next Meetings: 23 March 2023 Organizational Changes Meeting; 6 April 2023 Business Meeting

*attached **to be attached

28 February 2023

Sarah Willey-Thomas
Associate University Secretary

University of Waterloo
STAFF RELATIONS COMMITTEE
Minutes of the 26 January 2023 Meeting

Present: Kathy Becker (for Dave McDougall), Courtney Bremer, Priscila Carrara, Yessenia Guerrero, Lisa Habel (for Steve Bradley), Michelle Hollis (co-chair), Lee Hornberger, Agata Jagielska (co-chair), Cathy Newell Kelly, Sara Perkins, Sarah Willey-Thomas (secretary)

Regrets: Sheila Ager, James Rush, Kate Windsor

Organization of Meeting: Agata Jagielska, co-chair of the committee, took the chair, and Sarah Willey-Thomas acted as secretary. The secretary advised that a quorum was present. The agenda was accepted as distributed.

CONFIDENTIAL AGENDA

3. DECLARATION OF CONFLICT OF INTEREST

No conflicts were declared.

4. APPROVAL OF MINUTES (CONFIDENTIAL SESSION) OF THE 8 DECEMBER 2022 MEETING AND BUSINESS ARISING

The minutes of the 8 December 2022 meeting were approved as presented. Newell Kelly and Becker. Carried unanimously.

5. ORGANIZATIONAL CHANGES (Michele Hollis)

- a. **Campus Wellness**
- b. **Centre for Career Action**
- c. **Dean of Engineering Office – Advancement Team**
- d. **Library – Circulation**
- e. **Registrar’s office – Student Awards & Financial Aid Office**
- f. **Dean of Science Office**
- g. **Human Resources**
- h. **Vice-President, Administration & Finance**

The Committee reviewed the changes for information. The Committee discussed that the timing of the year coincides with changes for information; clarification of the USG for the Vice-President, Administration & Finance change; and process for declaring conflict of interest and what to do if there are questions about another member’s conflict of interest during the meeting.

6. OTHER BUSINESS

There were no matters for other business.

- 10. NEXT MEETING:** 9 February 2023, 1:00 p.m. to 2:30 p.m. (business meeting)
23 February 2023, 1:00 p.m. to 2:30 p.m. (organizational changes meeting)

13 February 2023

Sarah Willey-Thomas
Associate University Secretary

**University of Waterloo
STAFF RELATIONS COMMITTEE
Minutes of the 9 February 2023 Meeting**

Present: Kathy Becker (for Dave McDougall), Steve Bradley, Courtney Bremer, Priscila Carrara, Yessenia Guerrero, Michelle Hollis (co-chair), Lee Hornberger, Agata Jagielska (co-chair), Cathy Newell Kelly, Sara Perkins, Sarah Willey-Thomas (secretary), Kate Windsor

Guest: Stephen Murphy (6), Kirsten Muller (7)

Regrets: Sheila Ager, Lisa Habel, James Rush

Organization of Meeting: Michelle Hollis co-chair of the committee, took the chair, and Sarah Willey-Thomas acted as secretary. The secretary advised that a quorum was present. The agenda was accepted as distributed.

CONFIDENTIAL AGENDA

4. DECLARATION OF CONFLICT OF INTEREST

No conflicts were declared. Sara Perkins declared to be a member of the PDC for Policy 12 and Lee Hornberger declared to be a member of the PDC for Policy 57. The Committee agreed that this would not be considered a conflict for the purposes of this meeting.

5. APPROVAL OF MINUTES (CONFIDENTIAL SESSION) OF THE 12 JANUARY 2023 MEETING AND BUSINESS ARISING

The minutes of the 12 January 2023 meeting were approved as presented. Jagielska and Newell Kelly Carried unanimously.

6. POLICY 57 – EMPLOYMENT ACCOMODATIONS

Hollis noted that the Committee may not be in a position to make a decision on the Policy at this meeting, but there will be an opportunity to discuss the proposed Policy and to provide feedback after the meeting. Stephen Murphy joined the meeting. Murphy provided an outline of the policy, noting back and forth between the Committee and Administration; delays in responses and rationale for the delays; and identified a stumbling block associated with definitions of various personnel.

The Committee discussed clarifying barriers and in particular the meaning of attitudinal barriers and barriers within the social area of employment; process for a manager when a manager notices a decline in performance; need for further clarification of legal terms; need for clarity about the extent to which an employee consents to steps in the policy; timing and development of a Central Office; identifying which office on campus could operate objectively and clarity in the policy about level of objectivity; and whether or not administration could not proceed with the central office after policy is finalized. Stephen Murphy left the meeting.

The Committee discussed sending feedback to Sarah Willey-Thomas and Alice Raynard after the meeting; consideration of a central office for Policy 33, Policy 57 and Policy 12; discussion of an ombudsperson office at administration level and opportunity for the Staff Association to be involved; community consultations noted in the PDC's terms of reference; whether a policy can be approved before the Central Office has been created; PDC does not have the remit to say how the work is done; hesitancy to vote on the policy without knowing more about the Central Office; and clarification on what administration can change after policy is recommended to administration.

7. POLICY 12 – COMPASSIONATE CARE AND BEREAVEMENT LEAVES

Kirsten Muller joined the meeting. Hollis noted that the Committee would have feedback and would follow up with additional feedback after the presentation. Muller shared two slides noting PDC's approach to drafting the policy; PDC followed the negotiated terms of reference; streamlining of the current draft; removal of legal statutes from the Policy; changes to the policy to reflect the breadth of family relationships beyond ESA; awareness of other types of leaves; PDC's wanting to bring forward a recommendation apply to eligible employees that are on contract; and recommendation for a Central Office. The Committee discussed eligibility of contract employees; leave entitlement of grandparents and where eligible employee dependent on them for care and assistance; consideration of a diversity of family relationships; Central Office to provide guidance to a manager for more complicated types of leaves; omission of family caregiver leave in draft policy; how Policy 12 relates to Policy 57; and disclosure of personal information depends on the manager. Kirsten Muller left the meeting.

The Committee discussed how the PDC terms of reference were agreed upon by the University, FAUW and USWA and requested Willey-Thomas to seek clarification on this point.

8. OTHER BUSINESS

There were no matters for Other Business.

- 10. NEXT MEETING:** 23 February 2023, 1:00 p.m. to 2:30 p.m. (organizational changes meeting)
6 March 2023, 1:00 p.m. to 2:30 p.m. (business meeting)

13 February 2023

Sarah Willey-Thomas
Associate University Secretary



WATERLOO | HUMAN RESOURCES

PROPOSED ORGANIZATIONAL CHANGE WITHIN Office of Indigenous Relations

Submitted to: University of Waterloo Staff Relations
Committee

Submitted by: Jean Becker AVP Indigenous Relations

Full SRC Committee: February 23, 2023

Reviewed by SRC Sub Committee: February 10, 2023

Job Loss No

Appointment No

Waiver No

Document Submission: January 18, 2023



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Reason for Change/Re-organization:

The Office of Indigenous Relations is a relatively new unit, and we are in the process of building our team. This role supports the work of the AVP and will supervise the Associate Director and promote a team environment. They will provide strategic leadership and lead the development of guidelines, programs, and practices in the OIR. The impacted employees have all been spoken to and are excited about the changes.

Will there be job loss? No

There is no potential for job loss, all current administrative staff will retain their current positions.

How many people/what positions will be impacted by the changes?

Position Title	Position Number	Classification	Anticipated Impact	Incumbent
AVP IR	00021015	E40	Loss of 2 direct reports	Jean Becker
Associate Director Indigenous Relations	00090272	USG 12	Reporting Minimal change to job scope	Robin Stadelbauer
Indigenous Relations Coordinator	00042687	USG 9	Reporting	Kayla Murphy
Indigenous Special Project Coordinator	00073422	USG 9	Reporting	Kevin George



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What consultation has taken place to date?

Detail the meetings that have taken place to date about the proposed changes for example:

- Oct 2022** Vice President and Provost – discussed new structure.
- Nov 2022** AVP OIR met with HR to discuss organizational structure redesign, changes in reporting; advice sought as to whether the planned changes would constitute a reorganization. HR advised on next steps.
- Dec 2022** AVP OIR met with the OIR team to discuss the proposed changes to reporting and job descriptions. The primary change is that the ADs will report to the Director. There are no changes to their job descriptions.
- Dec 2022** New job description sent to HR for evaluation.
- Dec 2022** Department meeting to go over proposed changes and to confirm that the organizational changes would be presented to February SRC, this gave an opportunity for staff to ask any questions and for feedback to be obtained for the SRC documentation.
- Dec 2022** AVP OIR worked with HR on documentation to be provided for February SRC.
- Jan 2023** Review by Human Resources and Staff Relations Committee
- Feb 2023** Posting of new position
- March 2023** Director Indigenous Relations position filled, and new reporting structure implemented

Do you foresee any potential for Reclassification of Positions? NO

Current Title	New Title (if applicable)	Classification	Date of Last Review	Change to Scope	Reclassification Anticipated
AVP OIR	n/a	E 40	n/a	~ 5-10	no
AD Indigenous Relations	n/a	USG 12	2022	~ 5-10	no



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Indigenous Relations Coordinator	n/a	USG 9	2023	~ 5%	No
Indigenous Special Project Coordinator	n/a	USG 9	2020	~ 5%	No

What is the Communication Plan?

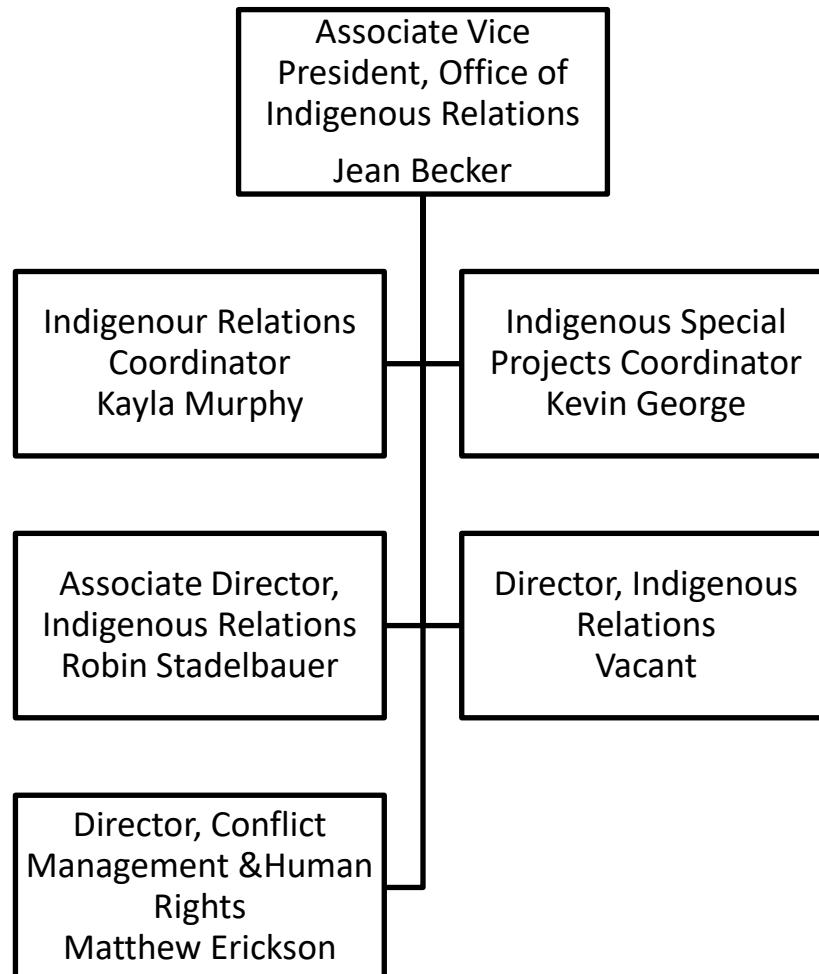
Feb 2023 AVP OIR to meet with all staff members after SRC to confirm changes and the dates for Implementation

Feb 2023 New position posted



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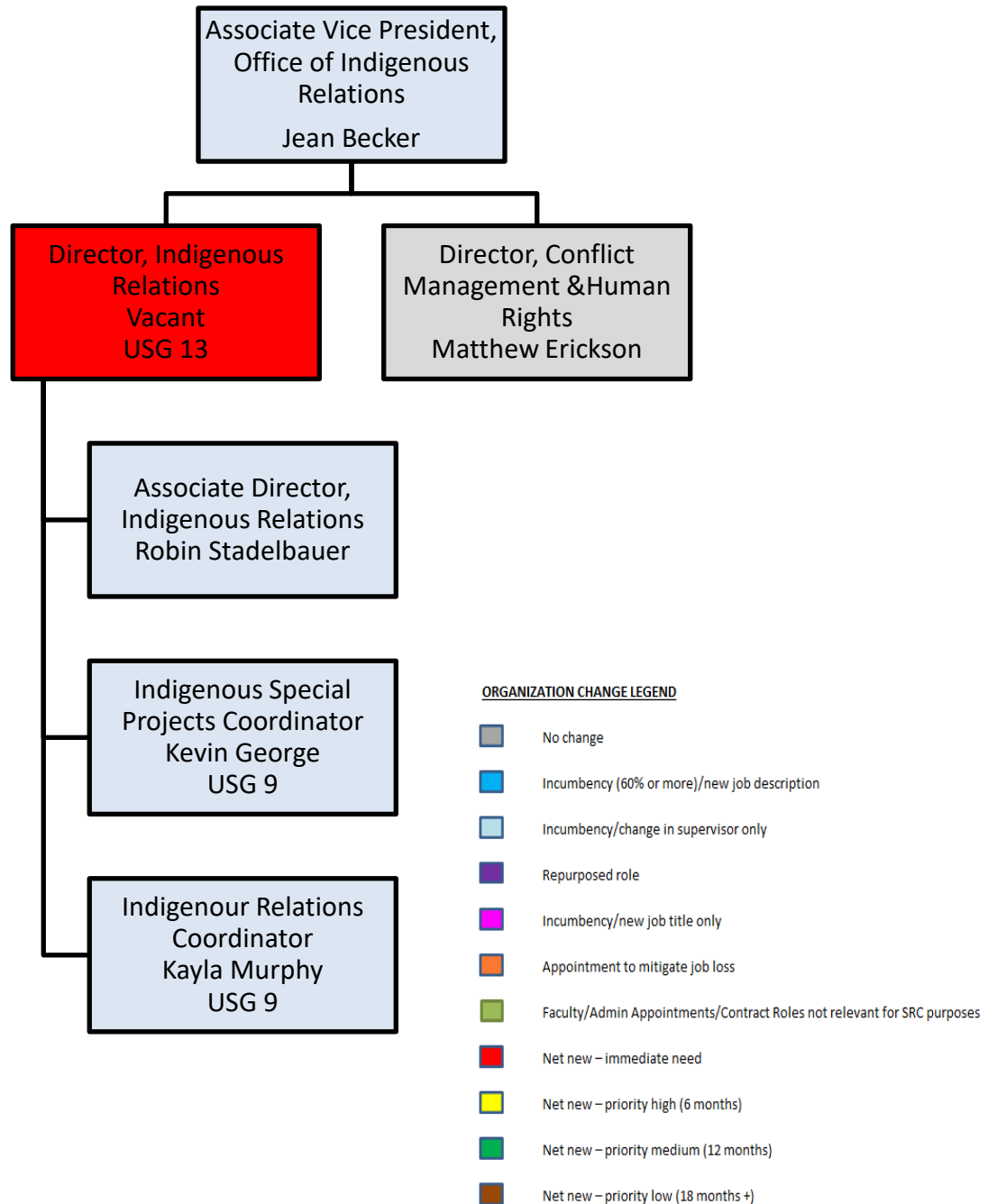
Current Organizational Structure January 2023





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Future Organizational Structure March 2023





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PROPOSED ORGANIZATIONAL CHANGE WITHIN

Co-operative and Experiential Education (Centre for WIL and Work-Learn Institute)

Submitted to: University of Waterloo Staff Relations Committee

Submitted by: Norah McRae

Full SRC Committee: February 23, 2023

Reviewed by SRC Sub Committee: February 10, 2023

Job Loss No

Appointment No

Waiver No

Document Submission Date: January 27, 2023



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Reason for Change/Re-organization:

The WIL Training Coordinator position was created in 2020 to support the Center for Work Integrated Learning with the development of resources and training materials on work-integrated learning. It became vacant in 2021, and the responsibilities of this position were shifted to the Work-Learn Institute. Prior to submitting the request to move this FTE between two departments, we were waiting on ensuring that the Center for WIL has confirmed some additional changes, which occurred during the SRC in December 2022.

At this point, we are requesting the move of this FTE from the Center for WIL to the Work-Learn Institute. The position will be repurposed into an Educational Developer role which has been created. This position aligns more closely with the required work of the unit.

Will there be job loss?

There is no potential for job loss, all current staff will retain their current positions, and the position moving is vacant.

How many people/what positions will be impacted by the changes?

Position Title	Position Number	Classification	Anticipated Impact	Incumbent
WIL Training Coordinator	00001234	USG 8	Reporting change Repurposed FTE – from WIL Training Coordinator to Educational Developer Role	Vacant
Director, Center for WIL	00005120	USG 15	Reporting change, loss of direct report	Anne-Marie Fannon (Incumbent) Andrea Prier (Secondment)



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Director, Work Learn Institute	00004838	USG 15	Reporting change, adding 1 direct report	Judene Pretti (Incumbent) Anne-Marie Fannon (Secondment)
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What consultation has taken place to date?

September 2021

Discussion with Directors in Centre for WIL and Work-Learn Institute and with Associate Provost, CEE on allocation of responsibilities associated with the WIL Training Coordinator role

November 2021

Discussion with Work-Learn Institute staff about expanded mandate and potential addition of WIL Training Coordinator or similar roles to support expanded mandate.

November 2021 – December 2022

Pause in changes while additional organizational change activities took place within Work-Learn and the Centre for WIL

December 2022

Discussion between the Directors of the Centre for WIL and WxL to move forward with the moving of the position. Approval from Associate Provost, CEE. Confirmation that the WIL Training coordinator FTE will be moved from the Centre for WIL to the Work-Learn Institute and repurposed as an Educational Developer.

What is the timeframe for implementation?

February 2023 Review by Human Resources and Staff Relations Committee

February 2023 Posting of new position

March/April 2023 Educational Developer position filled



Do you foresee any potential for Reclassification of Positions?

Current Title	New Title (if applicable)	Classification	Date of Last Review	Change to Scope	Reclassification Anticipated
WIL Training Coordinator	Educational Developer	USG 11	Dec 2022	New role	New position

What is the Communication Plan?

- Feb 2023** Messaging to WxL and Centre for WIL staff
- Feb 2023** Posting of new position
- March/April 2023** Position update through CEE Operational Matters

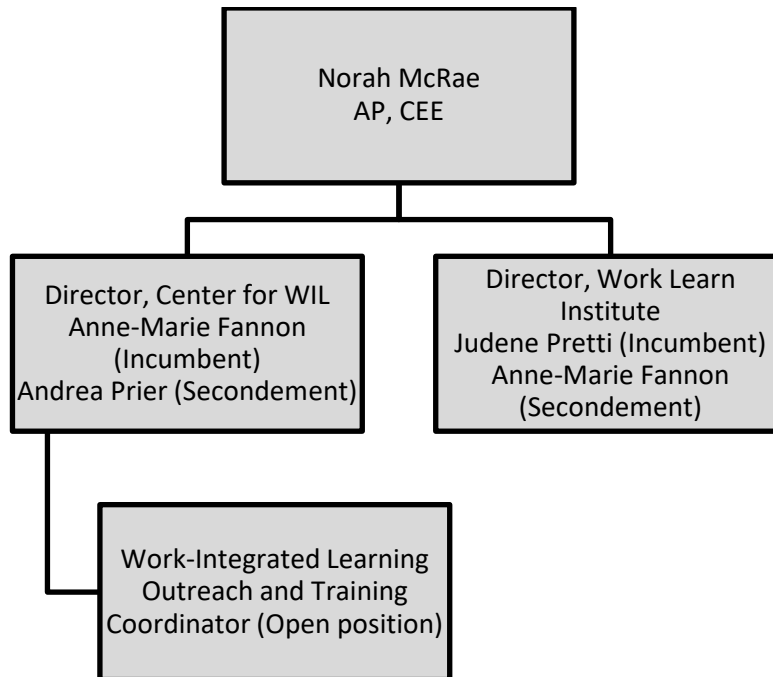


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Organizational Charts

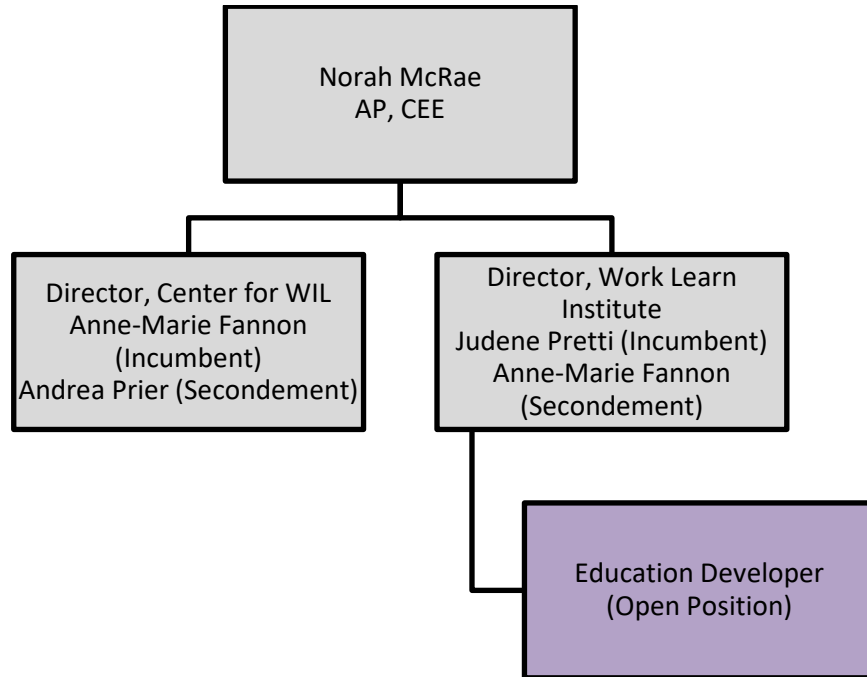
Insert the following Org Charts here:

- 1) Current state organizational chart





2) Future state organizational chart



ORGANIZATION CHANGE LEGEND

- No change
- Incumbency (60% or more)/new job description
- Incumbency/change in supervisor only
- Repurposed role
- Incumbency/new job title only
- Appointment to mitigate job loss
- Faculty/Admin Appointments/Contract Roles not relevant for SRC purposes
- Net new – immediate need
- Net new – priority high (6 months)
- Net new – priority medium (12 months)
- Net new – priority low (18 months +)



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PROPOSED ORGANIZATIONAL CHANGE WITHIN Co-op Services (CEE)

Submitted to: University of Waterloo Staff Relations
Committee

Submitted by: Jeremy Reed/Director, Co-op Services

SRC Committee Date: February 23, 2023

Reviewed by SRC Sub-Committee February 10, 2023

Job Loss No

Appointment No

Waiver No

Document Submission Date: January 27, 2023



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SUMMARY

Reason for Change/Re-organization:

Based on the size of the Co-op Services Operations team we have two Operations Managers that oversee teams of Account Coordinators who are split into regions with a range of experience (from USG 5-8). As staff move out for other roles, we aim to balance the support of each regional team to ensure adequate depth of knowledge for each region. We typically try to manage that from within the reporting teams, but occasionally we need to move people across teams to best support our regions.

With the return of a senior team member from maternity leave and a second staff member out on medical leave we are looking to make some small adjustments to balance the workloads across the regions of the two managers. Often this can be done within the reporting structure of each manager, but in this instance, we are looking at a small shift across the managers to make this balance work. This also comes at a time when we are still onboarding a new Operations Manager, so these changes also offer the support of this returning senior resource to complement that new manager.

We are proposing moving Daniel Kwon and Emily Richards from Jennifer Artindale to Anita O'Connor to offer Anita some additional depth in supporting one of our key regions. Daniel has been a high performer in the Account Coordinator role and handles a different type of workload than the returning staff members and Emily has the ability to process high volumes of activity, but which are key requirements of our largest regions.

To offset that we are looking to move Alicia Piruchta from Anita O'Connor to Jennifer Artindale to give Alicia additional team supports for her development in the Account Coordinator role as she makes her return from medical leave.

Will there be job loss?

There is no potential for job loss, all current staff will retain their current positions.



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How many people/what positions will be impacted by the changes?

Position Title	Position Number	Classification	Anticipated Impact	Incumbent
Account Coordinator	00003046	USG 7	Reporting change	Daniel Kwon
Account Coordinator	00007019	USG 6	Reporting change	Alicia Piruchta
Account Coordinator	00003048	USG 6	Reporting change	Emily Richards
Co-op Services Operations Manager	00003145	USG 10	Net change, gain of 1 direct report	Jennifer Artindale
Co-op Services Operations Manager	00006389	USG 10	Net change, loss of 1 direct report	Anita O'Connor

What consultation has taken place to date?

- **Dec 2022** - Operations Manager (Anita) spoke with Alicia Piruchta on reporting change. No concerns
- **Dec 2022** - Operations Manager (Anita) spoke with Emily Richards on reporting change. No concerns
- **Dec 2022** - Operations Manager (Anita) spoke with Daniel Kwon on reporting change. No concerns

Do you foresee any potential for Reclassification of Positions?

Position Title	New Title (if applicable)	Classification	Date of Last Review	Change to Scope	Reclassification Anticipated
Account Coordinator	N/A	USG 5-8	2017	0%	No
Co-op Services Operations Manager	N/A	USG 10	2020	0%	No



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Have you developed a Communication Plan?

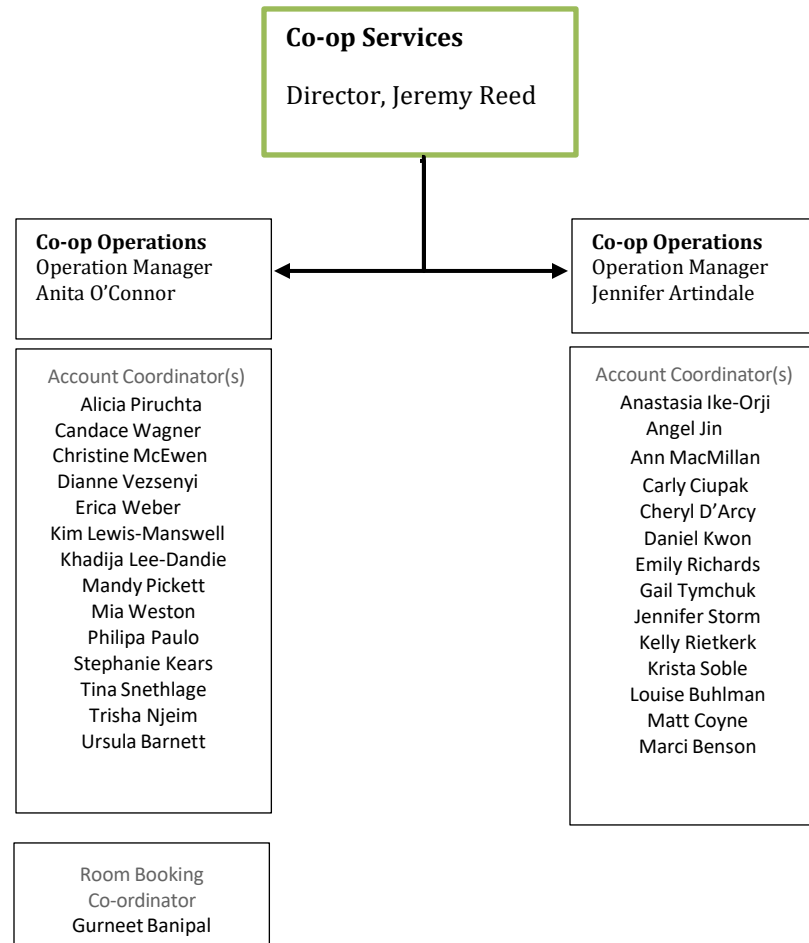
- **December 2022** – Affected employees were notified that the changes are moving forward.
- **February 2023** - Co-op Services Operations Team will be made aware of the formal reporting change as part of our monthly meetings.
- **February 2023** – CEE Leadership Team will be made aware of the formal reporting change in a leadership monthly update.



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Organizational Charts

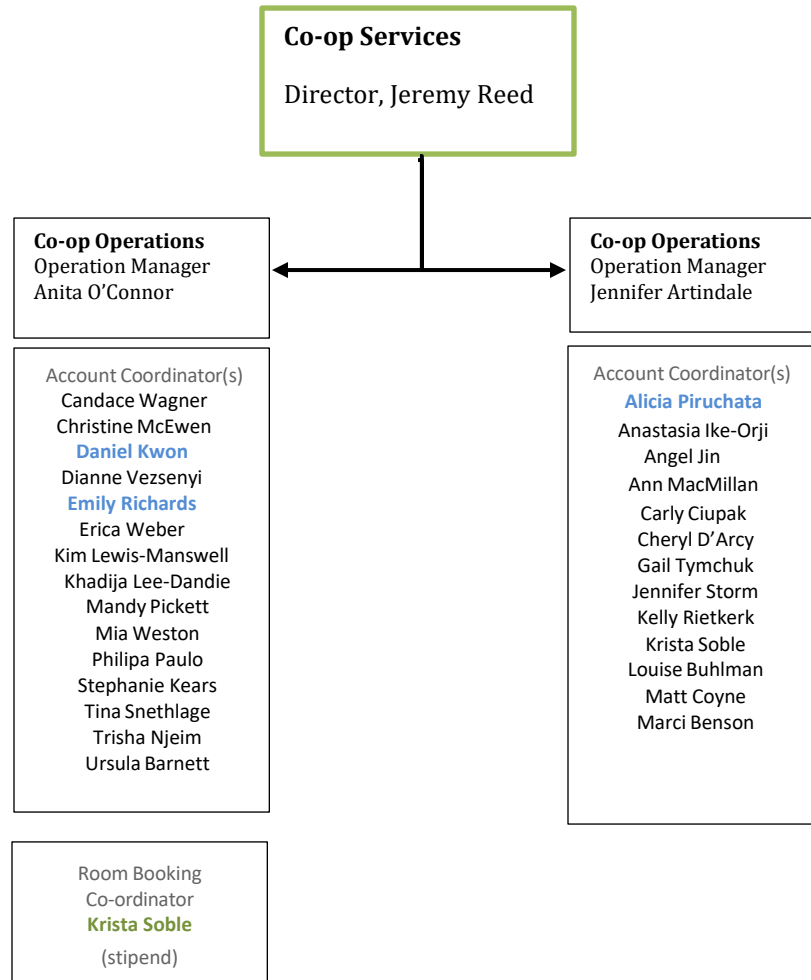
Insert the following Org Charts here: Current State





Future State

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ORGANIZATION CHANGE LEGEND

- No change
- Incumbency (60% or more)/new job description
- Incumbency/change in supervisor only
- Repurposed role
- Incumbency/new job title only
- Appointment to mitigate job loss
- Faculty/Admin Appointments/Contract Roles not relevant for SRC purposes
- Net new – immediate need
- Net new – priority high (6 months)
- Net new – priority medium (12 months)
- Net new – priority low (18 months +)



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PROPOSED ORGANIZATIONAL CHANGE WITHIN CENTRE FOR OCULAR RESEARCH & EDUCATION (CORE)

Submitted to: University of Waterloo Staff Relations
Committee

Submitted by: Lyndon Jones, CORE Director

Full SRC Committee: 23 February, 2023

Reviewed by SRC Sub Committee: 10 February, 2023

Job Loss No

Appointment No

Waiver No

Document Submission Date: 27 January 2023



Reason for Change/Re-organization: change in reporting structure

Bazil Sonier is the Data Processing Coordinator on the CORE Data Team. He is officially supervised by the CORE Administrator, Diane Bandura. However, his day-to-day tasks align most directly with Sarah Guthrie (Data, Statistics & Website Manager). She has been acting as his day-to-day supervisor.

Sarah has recently been hired as the Data, Statistics and Website Manager, which is an ongoing staff position graded as a USG 10. Since she is most knowledgeable about the role carried out by Bazil, thus, best able to evaluate his performance and Sarah's job now aligns with the supervisory organization, it would make sense for her to take over official supervision of Bazil.

Will there be job loss?

There is no potential for job loss, all current administrative staff will retain their current positions.

How many people/what positions will be impacted by the changes?

Position Title	Position Number	Classification	Anticipated Impact	Incumbent
CORE Administrator	00001998	USG 10	Loss of 1 direct report	Diane Bandura
Data, Statistics & Website Manager	00098846	USG 10	Gain of 1 direct reports	Sarah Guthrie
Data Processing Coordinator	00005461	USG 5	Reporting change	Bazil Sonier

What consultation has taken place to date?

Nov 2022 Administrator and Data, Statistics and Website Manager discussed the possibility of the later taking over as full supervisor for the CORE Data Team.

Dec 2022 Administrator contacted HR to discuss proposal and determine process for implementing change.



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- Dec 2022** Administrator and CORE Director discussed the proposed change to reporting.
- Jan 2023** Administrator and Data, Statistics and Website Manager met with impacted staff to introduce the proposed change to reporting. Administrator offered affected staff the opportunity to meet individually to discuss proposal. Except for the change to supervisor, the job description does not need to be modified. No concerns from affected employee.
- Jan 2023** Administrator worked with HR on documentation to be provided for February SRC.

What is the timeframe for implementation?

- Feb 2023** Review by Human Resources and Staff Relations Committee, February 10, 2023.
- Feb 2023** Updated job description sent to HR
- Mar 2023** Effective date of implementation March 1, 2023

Do you foresee any potential for Reclassification of Positions?

Current Title	New Title (if applicable)	Classification	Date of Last Review	Change to Scope	Reclassification Anticipated
Administrator		USG 10	2014	~ 5%	No
Data, Statistics & Website Manager		USG 10	2022	~ 5%	No
Data Processing Coordinator		USG 5	2022	~ 5%	No

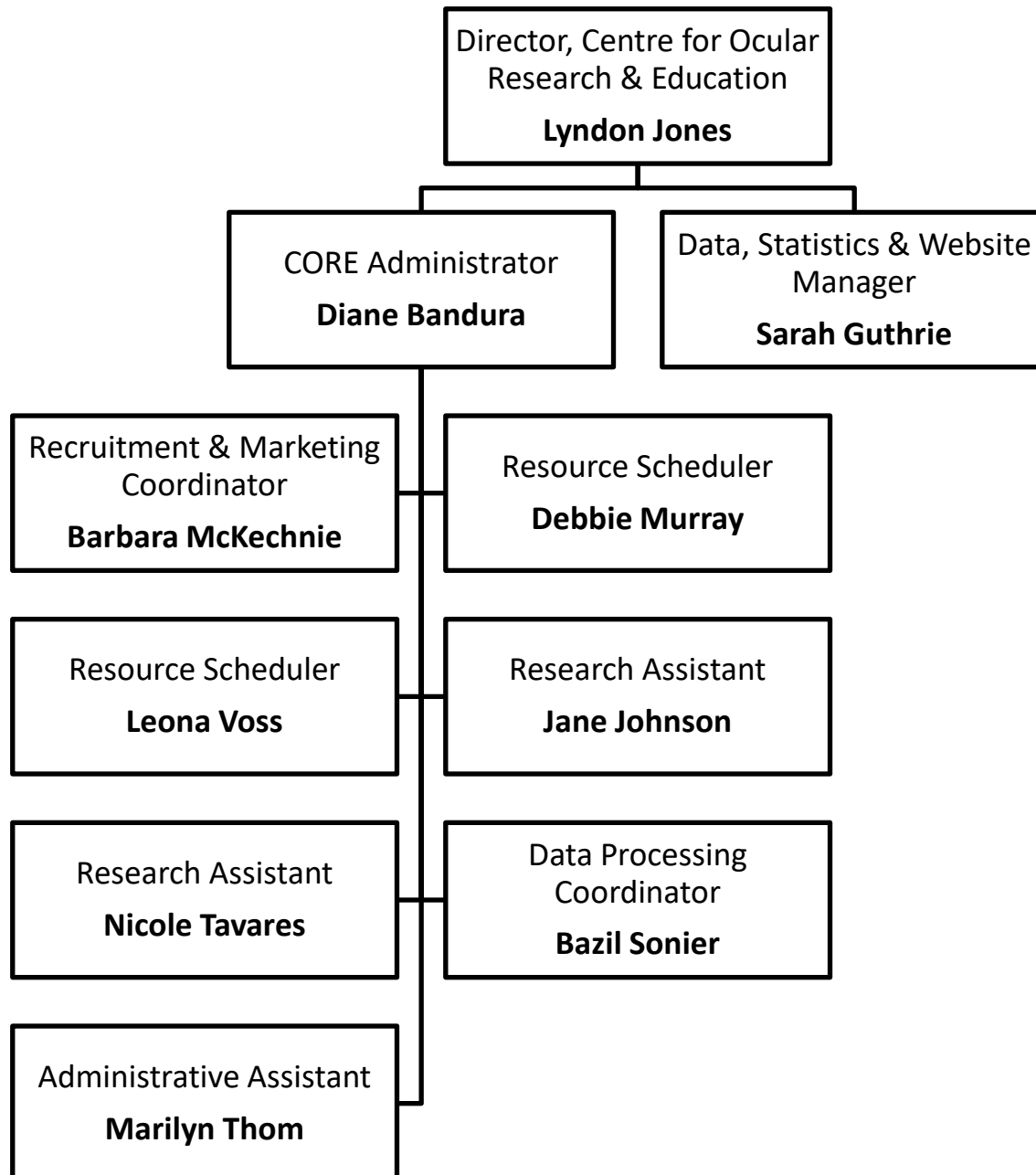
What is the Communication Plan?

- Feb 2023** Administrator and Data, Statistics and Website Manager to meet with affected staff after SRC to confirm changes and the dates for Implementation.
- Feb 2023** Rest of Staff in CORE will be notified



Organizational Charts

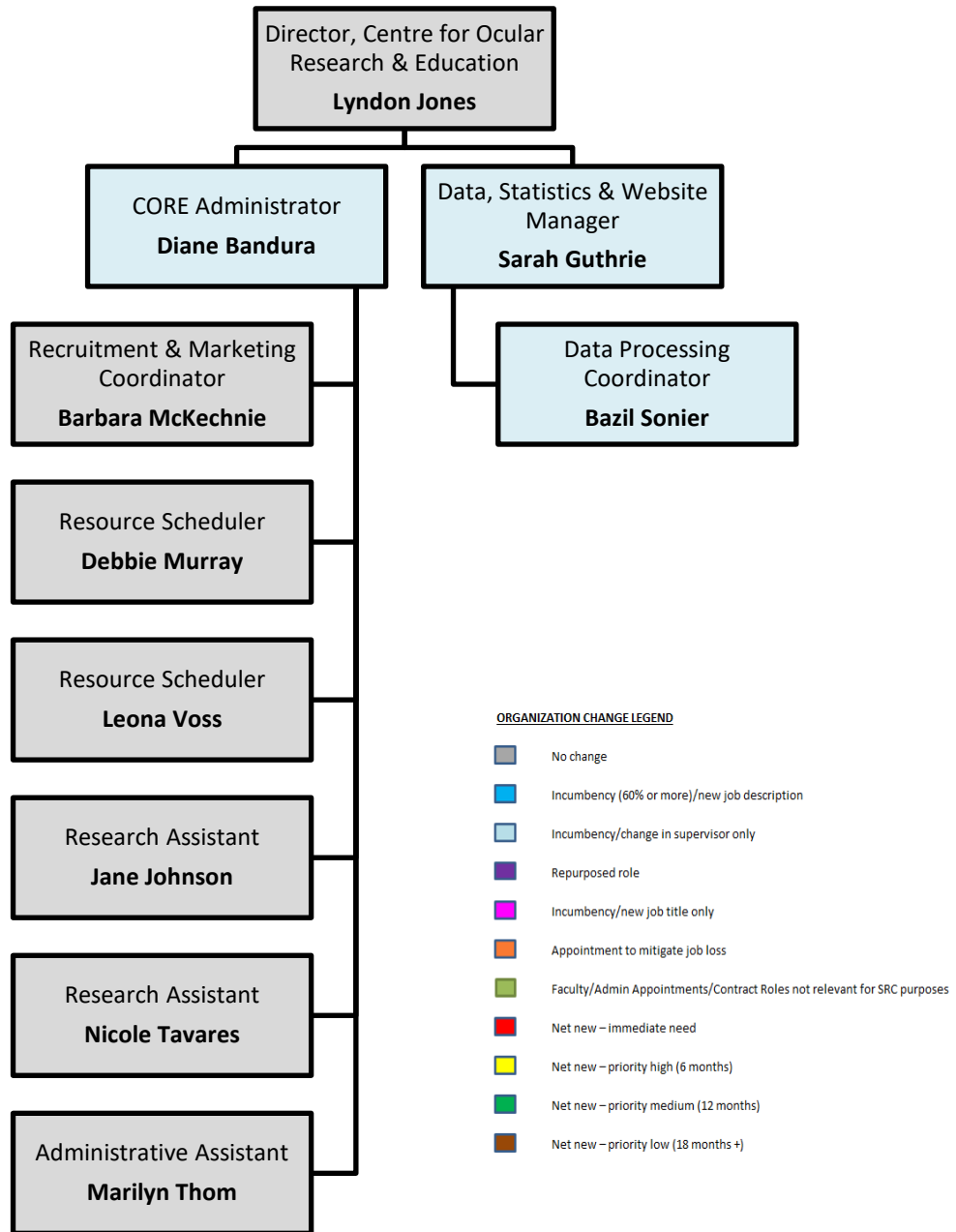
1) Current state organizational chart





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2) Future state organizational chart





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PROPOSED ORGANIZATIONAL CHANGE WITHIN Cybersecurity and Privacy Institute (CPI)

Submitted to: University of Waterloo Staff Relations Committee

Submitted by: N. Asokan, Executive Director (ED), CPI

Full SRC Committee: February 23, 2023

Reviewed by SRC Sub Committee: February 10, 2023

Job Loss No

Appointment No

Waiver No

Document Submission Date: January 27, 2023



Reason for Change/Re-organization:

Day-to-day operations of the Cybersecurity and Privacy Institute (CPI) is led by the Managing Director (MD) of CPI. All current staff members except for Krista Hrin report to the MD. Krista currently reports to the Executive Director (ED). This is a legacy arrangement (Krista joined CPI long before the current MD, Colin Russell, joined CPI). Krista briefly returned from her LTD leave during Fall 2022 and was working closely with the current CPI members until she had to resume her leave again. Colin is managing the day-to-day work and interactions of all CPI staff members including Krista. They have developed a good rapport and work well together.

The reason for the proposed changes, are as follows:

- Since the MD is managing day-to-day operations, having the Operations Manager report formally to the MD will benefit CPI's operations
- It will also benefit the Operations Manager to have the MD, who is deeply familiar with the Operations Manager's day-to-day responsibilities and work plans, as the person they formally report to
- The rapport and smooth working interactions already established between the two individuals, Krista and Colin, will continue after the formal change in the supervisory structure

Colin was formally hired as the full-time, permanent MD of CPI as of January 16, 2023. Prior to that, he was a part-time MD on a fixed-term secondment from the Office of Research. This request for formal change in reporting is being made at the earliest possible opportunity after the permanent MD position has been filled.

Will there be job loss?

There is no potential for job loss, all current administrative staff will retain their current positions.



How many people/what positions will be impacted by the changes?

Position Title	Position Number	Classification	Anticipated Impact	Incumbent
Executive Director, CPI	00007081	Faculty	Loss of 1 Direct Report	N. Asokan
Managing Director, CPI	00007130	USG 15	Gain of 1 Direct Report	Colin Russell
Operations Manager	00007205	USG 8	Reporting Change	Krista Hrin

What consultation has taken place to date?

- Sep 2022** CPI Leadership Team (ED, AD, and MD) discussed the change.
- Oct-Dec 2023** The proposed new organizational structure was included in CPI's "Progress and Renewal Report". CPI's Board, as well as the entities involved in the renewal process (Office of Research, Senate Graduate and Research Council).
- Dec 2023** Discussion with Krista about the upcoming possibility of a formal change in supervisor from ED to MD was had; Krista appeared to be fine with the change.
- Jan 2023** ED consulted with HR on the process and incorporated HR's advice in formulating the request.
- Jan 2023** Executive Officer worked with HR on documentation to be provided for February SRC.

Note: Krista continues to be on LTD leave.

What is the timeframe for implementation?

- Feb 2023** Review by Human Resources and Staff Relations Committee
- Mar 2023** Effective date of implementation March 1st, 2023



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Do you foresee any potential for Reclassification of Positions?

No

What is the Communication Plan?

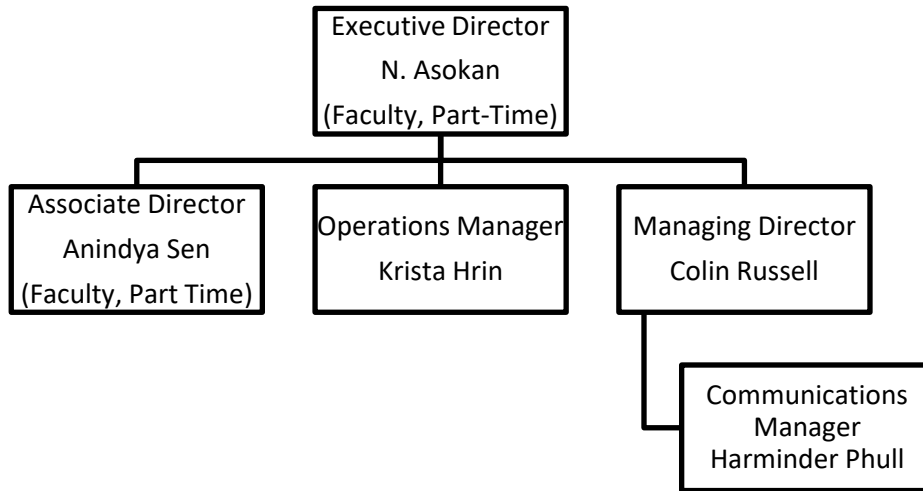
Feb 2023 ED and MD to inform Krista of the changes by email during her leave (if appropriate based on the advice of Occupational Health); and in person once she returns from her LTD leave

Mar 2023 Announcement to the rest of the CPI team, once Krista has returned from leave

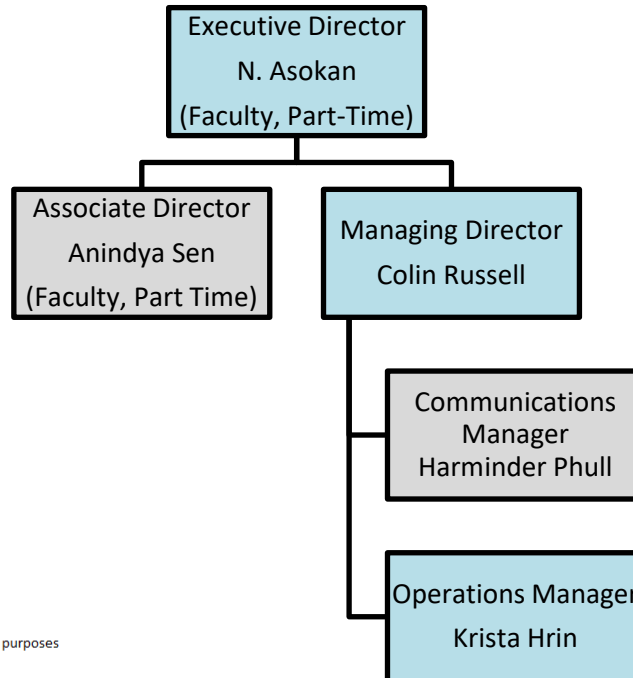


Organizational Charts

1) Current state organizational chart



2) Future state organizational chart



ORGANIZATION CHANGE LEGEND

- No change
- Incumbency (60% or more)/new job description
- Incumbency/change in supervisor only
- Repurposed role
- Incumbency/new job title only
- Appointment to mitigate job loss
- Faculty/Admin Appointments/Contract Roles not relevant for SRC purposes
- Net new – immediate need
- Net new – priority high (6 months)
- Net new – priority medium (12 months)
- Net new – priority low (18 months +)



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PROPOSED ORGANIZATIONAL CHANGE WITHIN Library, Circulation Services Department

Submitted to: University of Waterloo Staff Relations
Committee

Submitted by: Susan Arruda, Manager, Circulation
Services; Collections Maintenance

Full SRC Committee: February 23, 2023

Reviewed by SRC Sub Committee: February 10, 2023

Job Loss No

Appointment No

Waiver No

Document Submission Date: January 27, 2023



Reason for Change/Re-organization:

The Library Clerk: Item Preservation position (#00002238) currently held by Karen Fleet has changed since the position was developed due to changing priorities, reductions in staffing, increased knowledge/skillsets required to conduct the duties, and implementing a new library system with more sophisticated and complex work processes. The Collection Coordinator Assistant (vacant position #00001643, previously held by Laura Girard (promoted to different role)) and the Library Clerk: Item Preservation positions now conduct the same duties as outlined in the updated job description for the Collections Maintenance Assistant.

The main changes to this position include independently hiring, supervising, and mentoring casual student staff conducting collections maintenance work, and an increase in the technical skillsets required to perform the duties. All areas of the work have become more detailed and complex over the years due to the increased capabilities of our operating systems, the software applications we utilize, and additional responsibilities being added to this position as reductions in staffing occurred.

The reporting change is necessary because most of Karen's duties now fall under the supervision of the Collection Maintenance (CM) Project Coordinator. In addition, the vacant Collection Maintenance Assistant position (currently in recruitment phase) shares the same responsibilities as Karen, and they also report to the CM Project Coordinator. The degree of changes to Karen's position has been significant due to the shift in the library industry of moving away from receiving and maintaining print materials, to acquiring electronic formats. The work within the area of item preservation has decreased by over 75% over the past decade, and the project related work involving withdrawing duplicated and superseded print materials, that is overseen by the CM Project Coordinator, has greatly increased.

Will there be job loss?

There is no potential for job loss, all current administrative staff will retain their current positions.



How many people/what positions will be impacted by the changes?

Position Title	Position Number	Classification	Anticipated Impact	Incumbent
Manager, Circulation Services: Collections Maintenance	00001830	USG 10	Loss of 1 direct report	Susan Arruda
Collections Maintenance Project Coordinator	00002342	USG 7	Gain of 1 direct report	Laura Girard
Library Clerk: Item Preservation (Effective Jan 1 st , 2023: Collections Maintenance Assistant)	00002238	USG 5	Reporting change	Karen Fleet

What consultation has taken place to date?

Sep 2019 Collection Maintenance Manager met with the Department Head, Circulation Services to acknowledge and discuss the change in job scope that occurred with Karen Fleet’s position, Library Clerk: Item Preservation. An increased need to hire and supervise casual student staff developed and, Karen was also incorporating increased technical skillsets required for new processes. The Department Head acknowledged and supported submitting the position for reclassification but determined that waiting a few months until our new system Alma was live to confirm the full impact on Karen’s position before submitting the position for job reclassification was appropriate.

Oct 2019 The Collection Maintenance Manager met with Karen Fleet, Library Clerk: Item Preservation to acknowledge the increase in support that they are providing with supervising casual student staff and with conducting the more technical aspects of working with collections lists using Excel and learning how to batch process conducting location changes to books in Alma (automating tasks). Karen was



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informed that her position would be reviewed for reclassification shortly after Alma was implemented in December 2019.

- Jan 2020** A global pandemic was declared, and conducting non-essential services was restricted. Collections Maintenance work was stopped. This situation continued until the pandemic restrictions were lifted, and concerns for the number of staff in office areas eased. Collections Maintenance staff provided critical support to front line services during the pandemic restrictions.
- Feb 2020** The Collections Maintenance Manager met with Karen Fleet, Library Clerk; Item Preservation to advise that changes to her position could not move forward until the higher-level work that merited the changes to her position resumed.
- Jan 2021** Collections Maintenance routine work resumed with a few students hired to shelve returned books. Additional students were hired as restrictions were reduced and workflows increased.
- Sept 2022** Collections Maintenance Project work resumed, and Karen Fleet resumed conducting the higher level work and supervisory responsibilities for casual staff. Staffing changes were occurring with the Circulation Services department head position, two of the three manager positions and the Collection Maintenance Coordinator position. It was determined that it was more appropriate to wait until the new Collection Maintenance Project Coordinator was in place prior to incorporating changes to the reporting structure for position 00002238.
- Oct-Nov 2022** Recruitment and hiring of Collection Maintenance Project Coordinator occurred.
- Nov 2022** Manager, Collections Maintenance met with the Collection Maintenance Project Coordinator, Laura Girard, to review and confirm the duties of Karen's position and the proposed change to the reporting structure. Laura confirmed her agreement with the duties and scope of Karen's position, and that the proposed change to the reporting structure made sense. Laura fully supports the change in the reporting structure.
- Nov 2022** Manager, Collections Maintenance met with Karen Fleet, Library Clerk; Item Preservation to discuss the change to the reporting structure and Karen's updated job description. Karen confirmed that the updated job description for the Collection Maintenance Assistant accurately reflects the scope of her responsibilities and the work she conducts, and she readily agreed to the change to the reporting structure.



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Dec 2022 Manager, Collections Maintenance met with the Circulation Services Managers; the Associate University Librarian, Learning, Research & User Services; and the Associate University Librarian, Administration and Strategic Initiatives to discuss the changes to position 00002238 and agreement and approval to move forward was gained. The proposal to change the position was sent to the Associate University Librarian, Collections, Technology, Scholarly Communication, and they also supported and approved the changes to position 00002238. The change request was submitted.

What is the timeframe for implementation?

Feb 2023 Review by Human Resources and Staff Relations Committee

Feb 2023 Effective date of implementation: As soon as possible as the staff member is currently in this position and carrying out the responsibilities.

Do you foresee any potential for Reclassification of Positions?

Current Title	New Title (if applicable)	Classification	Date of Last Review	Change to Scope	Reclassification Anticipated
Library Clerk; Item Preservation	Collections Maintenance Assistant	USG 5	January 2023	~ 30	No

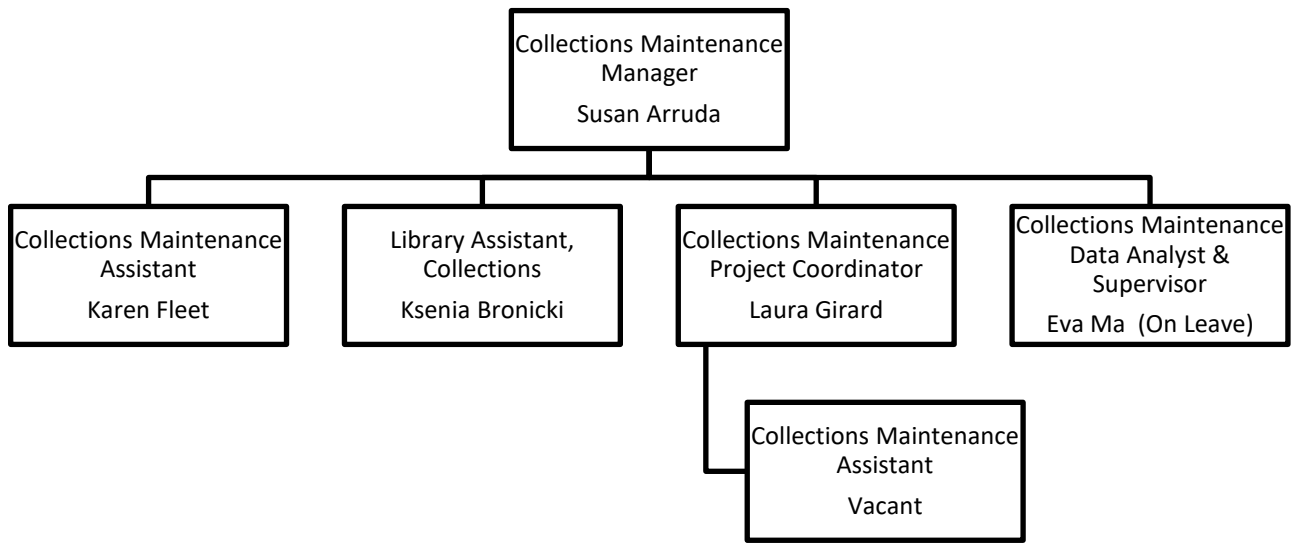
What is the Communication Plan?

Jan 2023 Job title and reporting structure changed accordingly as noted, and USG classification level confirmed for position 2238. No change to incumbent. Once approved, notifications would go to the Circulation Services Department to notify staff of the changes that have occurred with Karen's position, including the reporting structure.

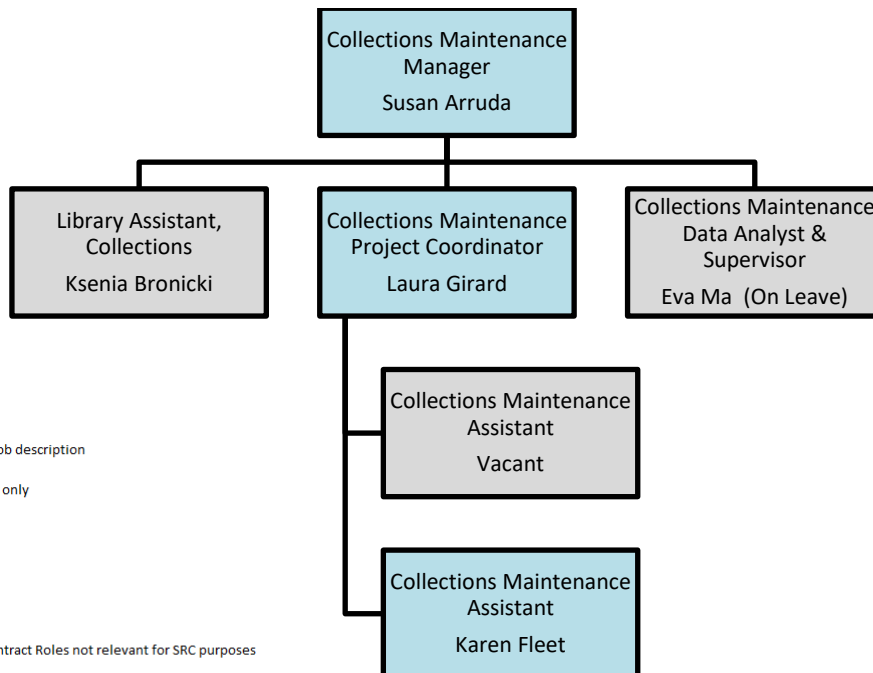


Organizational Charts

1) Current state organizational chart



2) Future state organizational chart



ORGANIZATION CHANGE LEGEND

- No change
- Incumbency (60% or more)/new job description
- Incumbency/change in supervisor only
- Repurposed role
- Incumbency/new job title only
- Appointment to mitigate job loss
- Faculty/Admin Appointments/Contract Roles not relevant for SRC purposes
- Net new – immediate need
- Net new – priority high (6 months)
- Net new – priority medium (12 months)
- Net new – priority low (18 months +)



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PROPOSED ORGANIZATIONAL CHANGE WITHIN

Print + Retail Solutions (P+RS)

Submitted to: University of Waterloo Staff Relations
Committee

Submitted by: Ryan Jacobs
Director, Print + Retail Solutions

Full SRC Committee: February 23, 2023

Reviewed by SRC Sub Committee: February 10, 2023

Job Loss No

Appointment No

Waiver No

Document Submission Date: January 26, 2023



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Reason for Change/Re-organization:

Marketing/Purchasing/Merchandising

Jaime Philip (Manager, Business Development & Campus Engagement) leaves P+RS at the end of January to take on a new role elsewhere. This departure allowed P+RS leadership to reconsider the structure of the Marketing and Purchasing & Merchandising teams.

The following changes to the P+RS structure are being proposed:

- 1) New job title: from Manager, Purchasing & Merchandising Strategy (00025121) to Manager, Marketing & Merchandising Strategy
- 2) Coordinator, Marketing & Communications (00054114) and Communications Design Specialist (00004084) will report to the Manager, Purchasing & Merchandising Strategy/Manager, Marketing & Merchandising Strategy (00025121).
- 3) Coordinator, Purchasing & Business Development (00087889) will change title to Assistant Manager, Business Development and will report to the Associate Director, Strategic Initiatives & Special Projects (00002335).
- 4) Elimination of the Manager, Marketing & Campus Engagement role (00002335) – the duties within this role will be spread amongst the Associate Director, Manager, Direct-to-Campus Sales, along with the Manager, Marketing & Merchandising Strategy.
- 5) Creation of a new role, Purchasing Assistant, reporting to Associate Director, Strategic Initiatives & Special Projects (00002335).

Combining the Purchasing & Merchandising and Marketing teams will recognize the already close working relationship between these two groups. This new blended team structure will further encourage thorough development of product lines, with associated promotional strategies considered from the start.

The new Purchasing Assistant role will provide administrative and logistical support to the newly combined team, allowing the Category Specialists to focus new product development and merchandising in our retail locations, and to the two buyers who purchase products for special orders. The role will report jointly to the Manager, Marketing & Merchandising Strategy and the Associate Director, Strategic Initiatives & Special Projects.

The new title for 00087889 will recognize the greater role the incumbent will play in P+RS's business development activities. The incumbent has displayed a strong aptitude for the



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business development portion of their responsibilities and this change will allow them to focus on that area going forward.

W Print

We propose to make the following changes to the P+RS structure:

- 1) Creation of a new position, Senior Project Coordinator.
- 2) Rename several positions in W Print to reflect their current areas of focus, and to recognize them as Project Coordinators.
 - Assistant Manager, W Print (00002249) changed to Project Coordinator (Wide Format)
 - Coordinator, Production & Customer Service (00003937) changed to Project Coordinator (Exams)
 - Coordinator, Courseware & Custom Publishing (00004252) changed to Project Coordinator (Course Materials)
- 3) Shipper/Receiver/Operator (00001413, 00002493, 00080849) positions will report to the new Senior Project Coordinator.

Creation of the new Senior Project Coordinator role will remove three direct reports from the Manager, Production (00004284), allowing them to devote more time to strategic considerations for W Print. Currently, the Manager spends a significant portion of each day on operational issues which will be downloaded to the Senior Project Coordinator in the new structure.

New job titles (i.e., Project Coordinators) recognize the various areas of focus for each of the staff. Note that while each staff member's area of focus is clearly defined, all project coordinators will remain capable of duties assigned to other Project Coordinators and will be expected to provide coverage for each other during absences. All Project Coordinators will thus have a mostly common job description, with specific areas of focus highlighted for each.

Will there be job loss?

There is no potential for job loss, all current administrative staff will retain their current positions.



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How many people/what positions will be impacted by the changes?

Position Title	Position Number	Classification	Anticipated Impact	Incumbent
Marketing/Purchasing/Merchandising				
Manager, Purchasing & Merchandising Strategy New title, "Manager, Marketing & Merchandising Strategy"	00025121	USG 10	Gain of two direct reports Job title change – possible increase in USG level	Emilia Zakarian
Manager, Marketing & Campus Engagement	00003986	USG 10	Elimination of position	Jaime Philip – vacating position 01/28/23
Coordinator, Marketing & Communications	00054114	USG 6	Reporting change (Emilia Zakarian)	Danielle Ortlieb
Communications Design Specialist	00004084	USG 6	Reporting change (Emilia Zakarian)	Alicia Narain
Coordinator, Purchasing & Business Development New title, "Assistant Manager, Business Development"	00087889	USG 6	Job title change Reporting change (Randy Dauphin) Some change in job scope	Erin van der Hoff (nee Pritchard)
Associate Director, Strategic Initiatives and Special Projects	00002335	USG 13	Gain of two direct reports Taking on some of the responsibilities from the	Randy Dauphin



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			eliminated position "Manager, Marketing & Communications"	
Manager, Direct-to-Campus Sakes	00001628	USG 8	Taking on some of the responsibilities from the eliminated position "Manager, Marketing & Communications"	John Jaray
Purchasing Assistant	N/A	TBD	Net new role	N/A
W Print				
Manager, Production	00004284	USG 9	Loss of three direct reports	Karen Ertel
Senior Project Coordinator	N/A	TBD	Net new role	N/A
Assistant Manager, W Print New title, "Project Coordinator (Wide Format)"	00002249	USG 6	Job title change	Yvonne Ertel
Coordinator, Production & Customer Service New title, "Project Coordinator (Exams)"	00003937	USG 5	Job title change Change in job scope to align with other Project	Lisa Holden



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			Coordinator positions	
Coordinator, Courseware & Custom Publishing New title, "Project Coordinator (Course Materials)"	00004252	USG 6	Job title change	Stephanie Singh (contract)
Shipper/Receiver/Operator (3)	00001413, 00002493, 00080849	USG 4	Reporting Change	Aygun Mehmet Ben Pahl Devin Kuchar (contract)



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What consultation has taken place to date?

Marketing/Purchasing/Merchandising

- Dec 2022** Director and Associate Director – discussed proposed new structure.
- Dec 2022** Director and Administrative Officer - discussed proposed new structure.
- Dec 2022** Director, Administrative Officer and HR Partner met to discuss proposed new structure and implementation process and timeline. HR Partner advised on appropriate path forward.
- Jan 2023** Director discussed proposed new structure with Manager, Purchasing & Merchandising Strategy; they support the change.
- Jan 2023** P+RS Strategic Planning Working Group reviewed and discussed proposed new structure; SPWG supports the change.
- Jan 2023** Director met with affected staff to discuss the proposed new structure; all support the change.
- Jan 2023** Job descriptions for Manager, Purchasing & Merchandising and Coordinator, Purchasing & Business Development (new title = Assistant Manager, Business Development) finalized.
- Jan 2023** Proposed updates to job descriptions in progress.

W Print

- July 2022** Director, Associate Director, Manager, Production and Administrative Officer discussed proposed new structure.
- Sept 2022** Director, Associate Director, Manager, Production and Administrative Officer discussed proposed new structure.
- Nov 2022** Associate Director and Manager, Production discussed the proposed new structure with affected staff; all support the changes.



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- Jan 2023** Associate Director and Administrative Officer discussed proposed new structure with HR Partner. HR Partner advised on appropriate path forward.
- Jan 2023** Proposed updates to job descriptions in progress.

What is the timeframe for implementation?

Marketing/Purchasing/Merchandising

- Feb 2023** Review by Human Resources and Staff Relations Committee
- Feb 2023** Official implementation upon approval by SRC
- Mar 2023** Posting of new position (Purchasing Assistant)
- Apr 2023** Purchasing Assistant position filled

W Print

- Feb 2023** Review by Human Resources and Staff Relations Committee
- Feb 202** Official implementation upon approval by SRC
- Feb 2023** Posting of new position (Senior Project Coordinator)
- Apr 2023** Senior Project Coordinator position filled



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Do you foresee any potential for Reclassification of Positions?

Current Title	New Title (if applicable)	Classification	Date of Last Review	Change to Scope	Reclassification Anticipated
Marketing/Purchasing/Merchandising					
Manager, Purchasing & Merchandising Strategy	Manager, Marketing & Merchandising Strategy	USG 10	2019	~ 15 – 25%	Unsure – possibly USG 11
Coordinator, Purchasing & Business Development	Assistant Manager, Business Development	USG 6	2022	~ 25 – 30%	Yes
Coordinator, Marketing & Communications		USG 6	2021	0	No
Communications Design Specialist		USG 6	2020	0	No
Associate Director, Strategic Initiatives and Special Projects		USG 13	2020	~5%	No
W Print					
Manager, Production	N/A	USG 9	2020	0	No
Assistant Manager, W Print	Project Coordinator (Wide Format)	USG 6	2020	10-20%	No
Coordinator, Production and Customer Service	Project Coordinator (Exams)	USG 5	2020	~25-30%	Yes
Coordinator, Courseware & Custom Publishing	Project Coordinator (Course Materials)	USG 6	2020	0	No
Shipper/Receiver/Operator (3)	N/A	USG 4	2020	0	No



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What is the Communication Plan?

Marketing/Purchasing/Merchandising

Feb 2023 Director to confirm SRC approval with affected staff, and to set up check-in meetings for 6 months

Feb 2023 Director to inform all P+RS staff members after SRC approval

W Print

Feb 2023 Associate Director to confirm SRC approval with affected staff, and to set up check-in meetings for 6 months

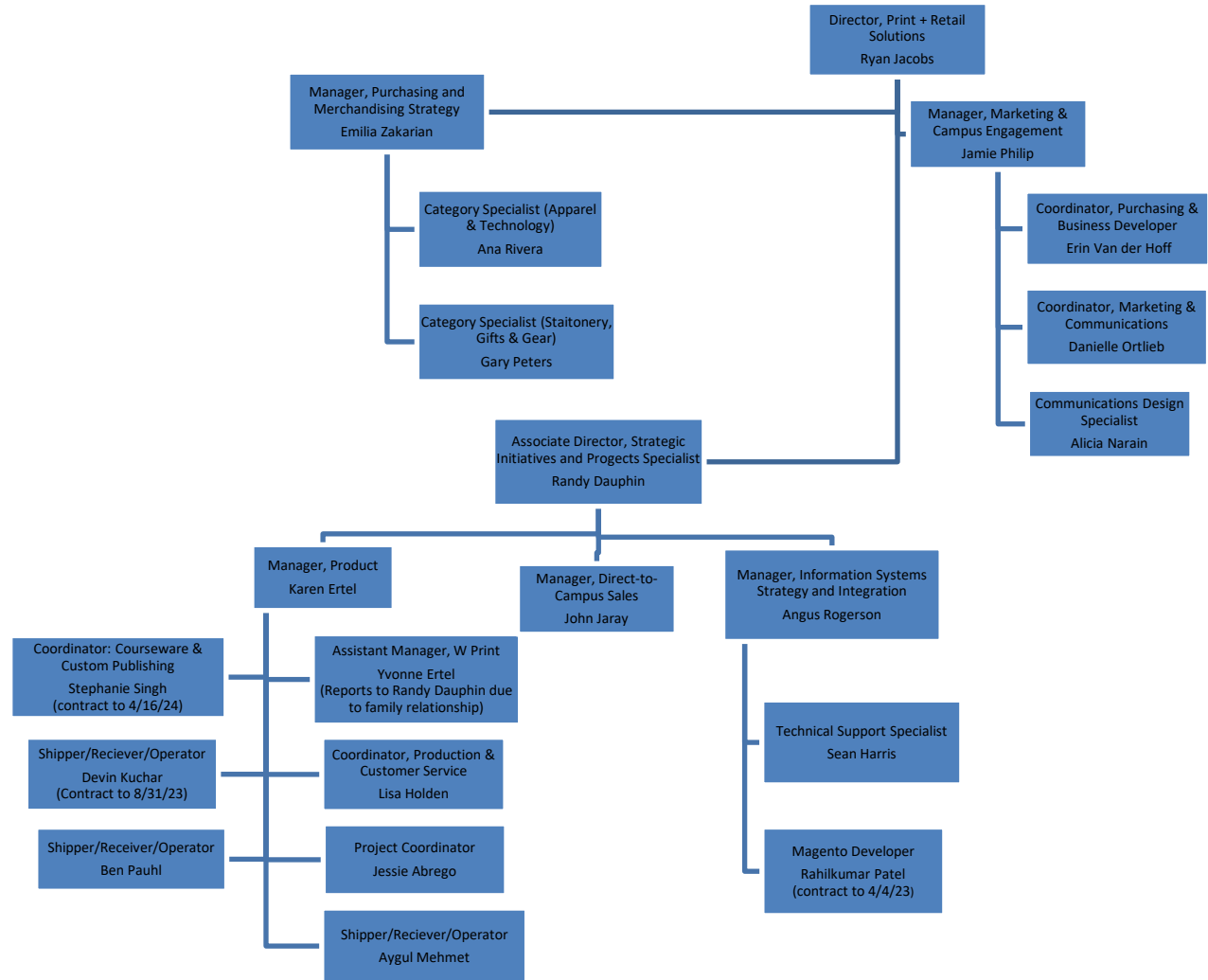
Feb 2023 Director to inform all P+RS staff members after SRC approval



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Organizational Charts

1. Current Chart



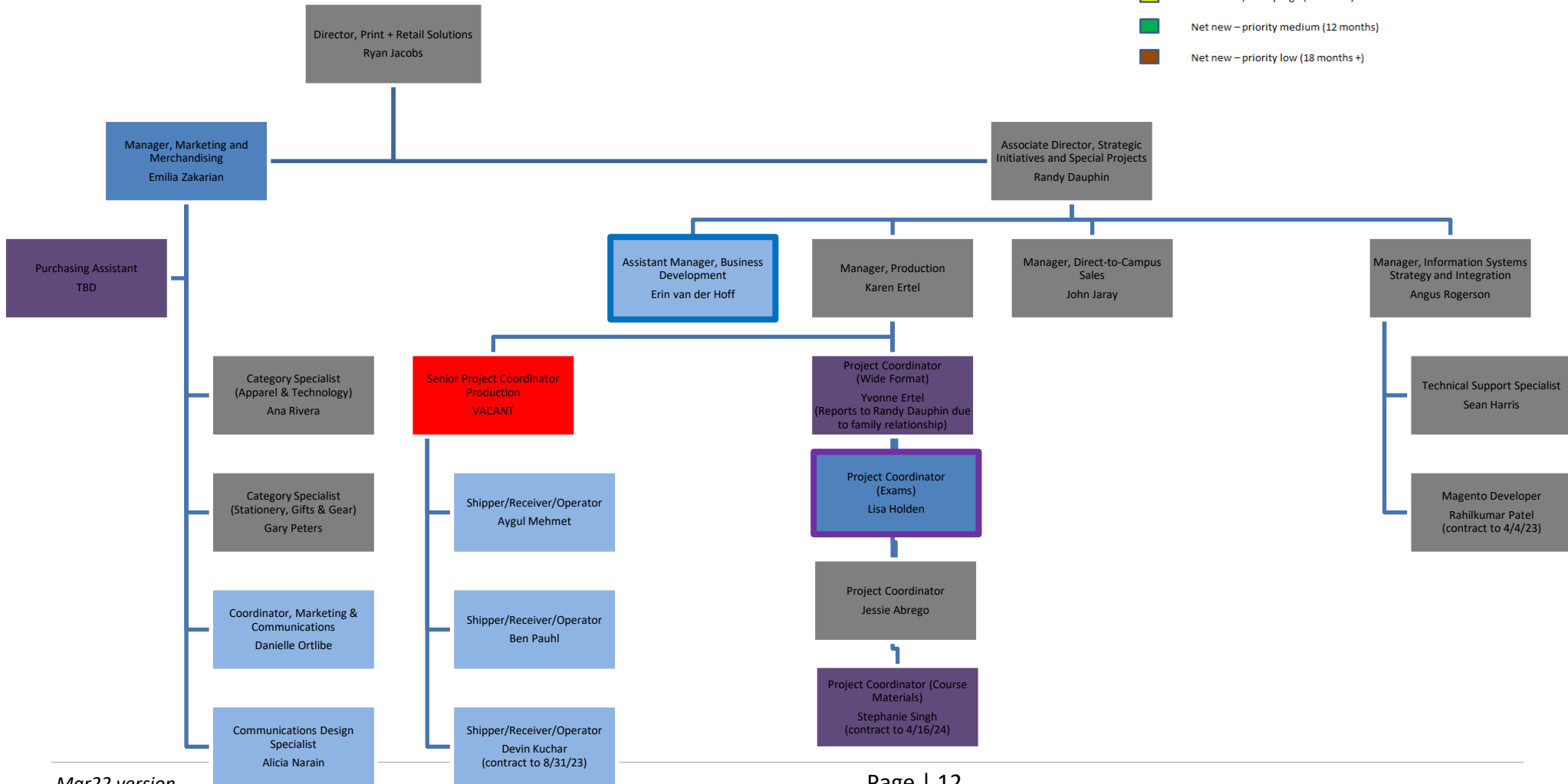


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2. Future Chart

ORGANIZATION CHANGE LEGEND

- No change
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PROPOSED ORGANIZATIONAL CHANGE WITHIN School of Finance and Accounting

Submitted to: University of Waterloo Staff Relations Committee

Submitted by: Mona Skuterud, Administrative Officer

SRC Committee Date: February 23, 2023

Reviewed by SRC Sub-Committee February 10, 2023

Job Loss No

Appointment No

Waiver No

Document Submission Date: January 27, 2023



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Reason for Change/Re-organization:

The Computing Financial Management (CFM) and Sustainability Financial Management (SFM) have staff that are called Program Managers. The primary role of these staff is to deal with students in these small, specialized programs.

Historically, the CFM Program Manager reported to the Administrative Officer in SAF so when the SFM Program Manager position was recently created we followed the same suit. This has created a large disconnect between SAF Student Advisors and the Program Managers. Both SFM and CFM students take courses in AFM and differing messaging to them has been occurring.

This would be corrected if there was a reporting change from the Administrative Officer to the Senior Manager, Operations who oversees the student advisors in SAF. Staff have been consulted on the change and did not have any concerns.

Will there be job loss?

There is no potential for job loss, all current administrative staff will retain their current positions.

How many people/what positions will be impacted by the changes?

Position Title	Position Number	Classification	Anticipated Impact	Incumbent
Administrative Officer	00001582	USG 13	Loss of 2 direct reports	Mona Skuterud
Senior Manager, Operations	00005107	USG 11	Reporting change	Breean Belton
Program Manager, CFM	00005097	USG 8	Reporting change	Heather Shaw (On Leave)
Program Manager, SFM	00078994	USG 8	Reporting change	Jesse MacLeod

What consultation has taken place to date?

Detail the meetings that have taken place to date about the proposed changes for example:



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- **Feb 2022** Dean, Chair and Executive Officer – discussed new structure.
- **Dec 2022** Administrative Officer discusses changes with Senior Manager
- **Jan 2023** Discussion with Director and Executive Officer
- **Jan 2023** Discussion with Program Managers

What is the timeframe for implementation?

- **Feb 2023** Review by Human Resources and Staff Relations Committee.
- **Mar 2023** Effective date of implementation March 1, 2023

Do you foresee any potential for Reclassification of Positions?

Current Title	New Title (if applicable)	Classification	Date of Last Review	Change to Scope	Reclassification Anticipated
Administrative Officer		USG 13	2019	>10%	No
Sr Mgr, Operations		USG 11	2022	>10%	No
Program Manager, SFM		USG 8	2021	>10%	No
Program Manager, CFM		USG 8	2021	>10%	No

Have you developed a Communication Plan?

- **March 2023** Communication to the wider faculty group about changes.



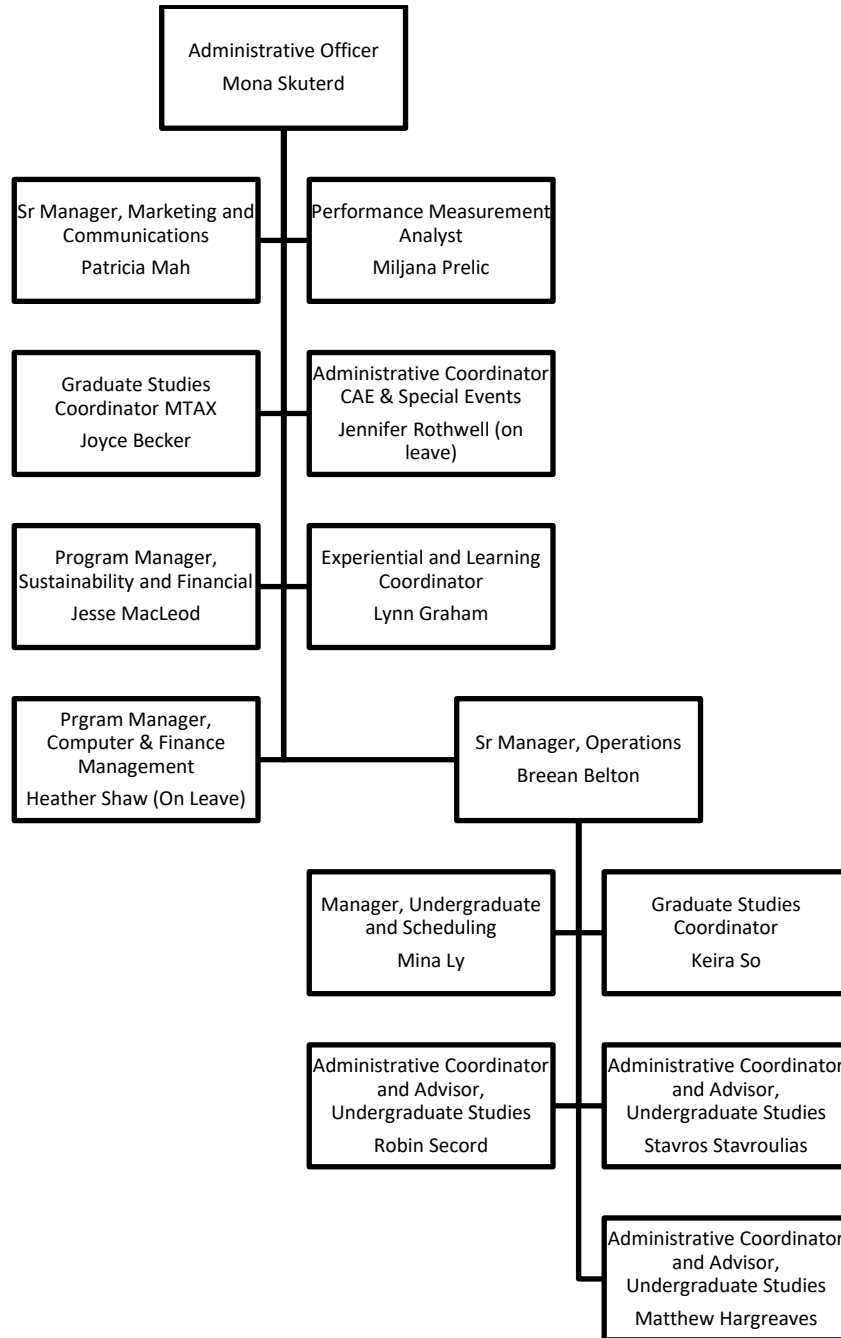
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Organizational Charts

- 1) Current state organizational chart



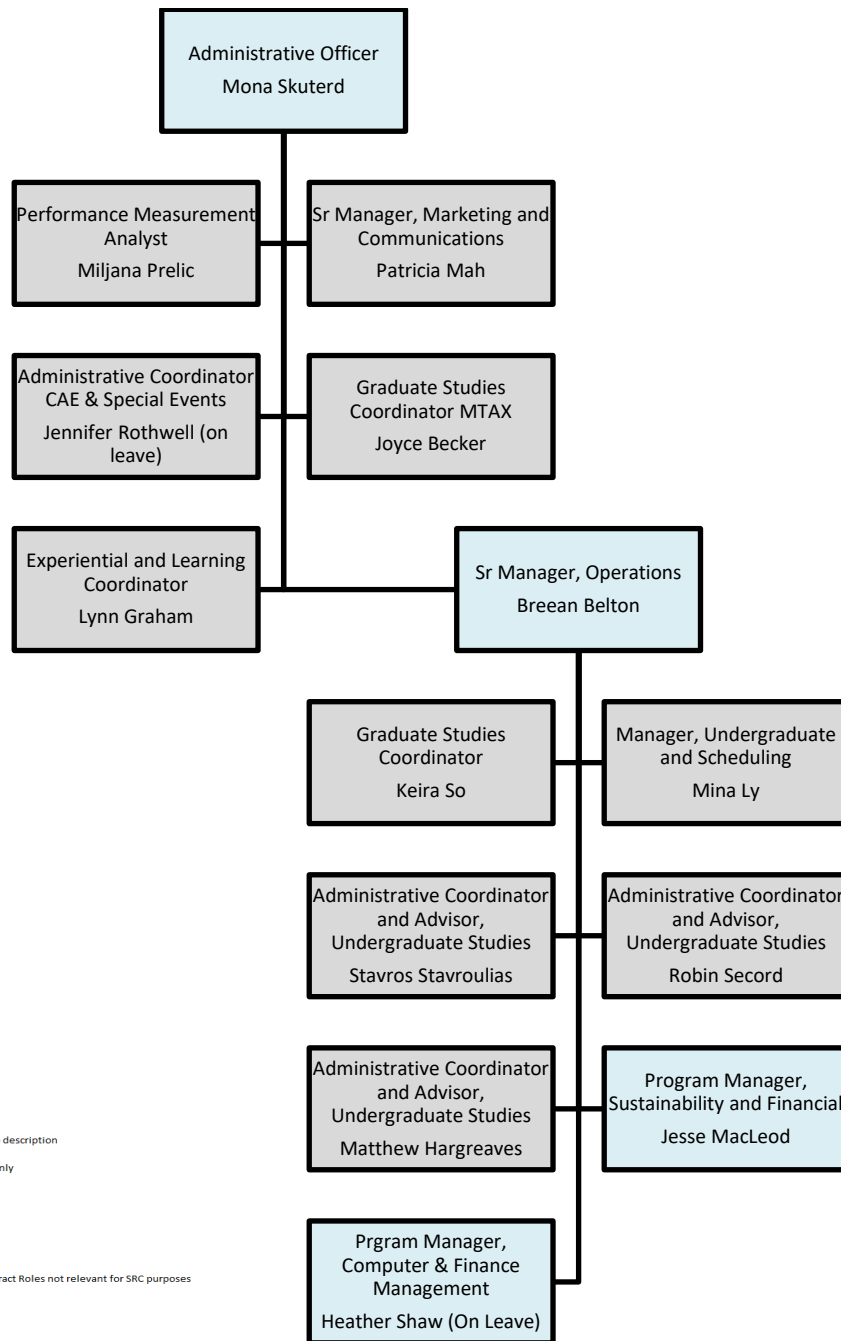
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2) Future state organizational chart



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PROPOSED ORGANIZATIONAL CHANGE WITHIN DEAN OF SCIENCE OFFICE

Submitted to: University of Waterloo Staff Relations Committee

Submitted by: David Timms, Director of Advancement

Full SRC Committee: February 23, 2023

Reviewed by SRC Sub Committee: February 10, 2023

Job Loss No

Appointment No

Waiver No

Document Submission Date: January 26, 2023



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Reason for Change/Re-organization:

This reporting change is requested to address the departure of the Associate Director (vacant), this position will be repurposed to a Senior Development Officer role.

Leah Gardiner (Senior Development Officer) will now report to the David Timms (Director of Advancement)

Will there be job loss?

There will be no job loss with this change.

How many people/what positions will be impacted by the changes?

Position Title	Position Number	Classification	Anticipated Impact	Incumbent
Senior Development Officer	00073413	USG 10	Reporting to Director of Advancement	Leah Gardiner
Associate Director, Science Advancement (Senior Development Officer)	00005153	USG 14	Position vacant, Repurpose	vacant
Director of Advancement, Faculty of Science	00005488	USG 15	Change in direct report	David Timms

What consultation has taken place to date?

January 2023 Dean and Executive Officer discussed new reporting structure.

January 2023 Discussed with HR on new reporting structure

January 2023 Discussed with affected employee. There were no concerns.

January 2023 Informal handover of supervisory role, with employee and supervisors was conducted.



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What is the timeframe for implementation?

January 2023 Repurposed SDO posted and hired

January 2023 Reporting change will be made after Sub Committee SRC meeting

Do you foresee any potential for Reclassification of Positions?

Current Title	New Title (if applicable)	Classification	Date of Last Review	Change to Scope	Reclassification Anticipated
Senior Development Officer		USG 10	2021	~ 5%	No
Associate Director, Science Advancement	Senior Development Officer	USG 14	2019	~ 50%	Yes, to be an USG 10
Director of Advancement, Faculty of Science		USG 15	2011	~ 10%	No

What is the Communication Plan?

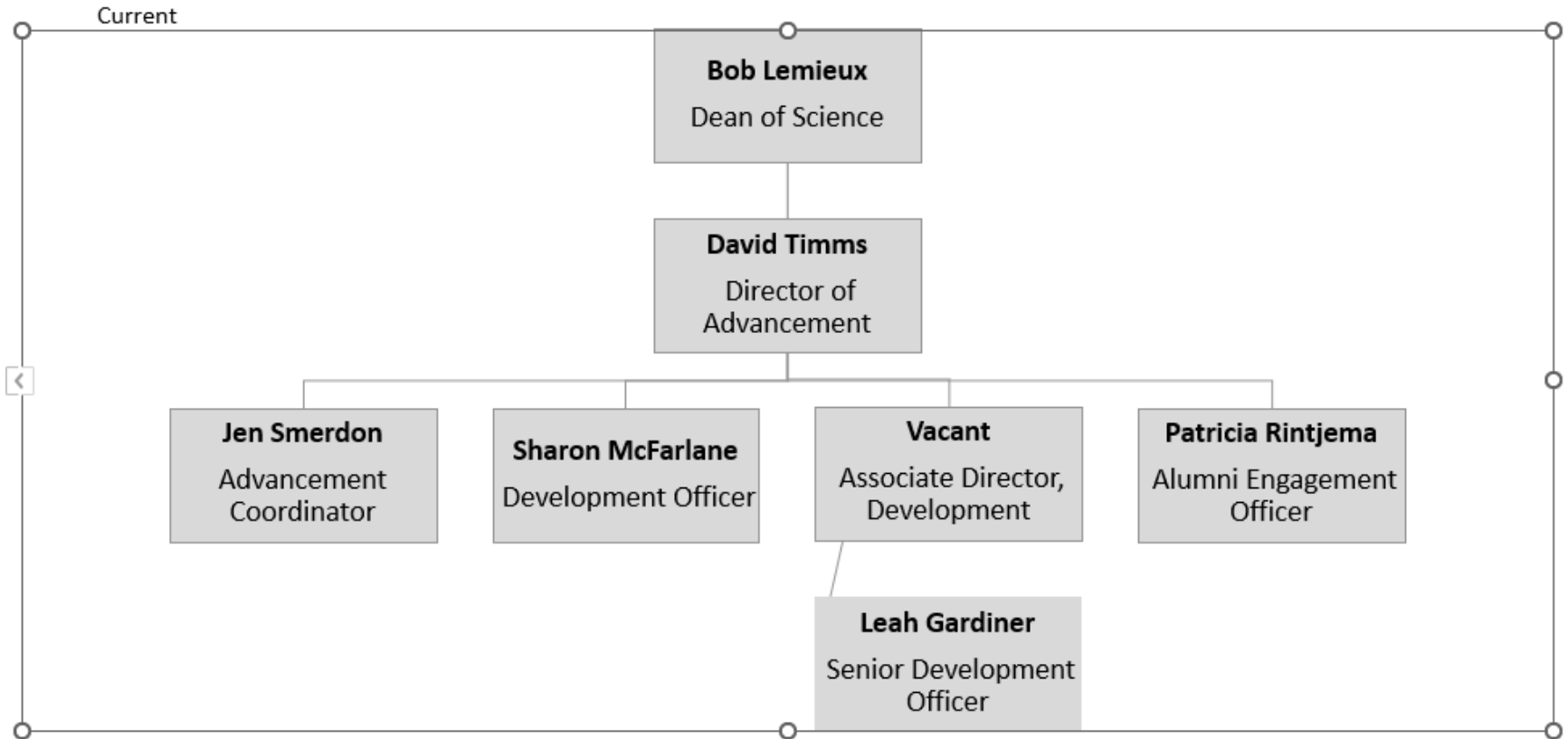
January 2023 Director of Advancement to meet with affected employee

January 2023 Communication to the wider staff about changes

Organizational Charts



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Future

