Welcome

Deidre ("Dee") Henne
Forward with Integrity

Patrick Deane
How can Administrators Deliver on “Forward with Integrity”

Roger Couldrey
Vice-President (Administration)
Financial Leadership Forum

November 28, 2011
Things Constant

Directions (1995) and Refining Directions (2003, reaffirmed 2008)

- Thus we will provide an innovative and stimulating learning environment where students can prepare themselves to excel in life, we will achieve increasingly high levels in research results and reputation by building on existing and emerging areas of excellence, and – a prerequisite for success in the preceding – we will continue to build an inclusive community with a shared purpose.
Things Changing

- More important perhaps will be the digital revolution. Far-reaching questions now demand to be answered: How should we conceive of learning institutions in a digital age? And how should McMaster reconfigure itself in that context, yet still remain true to its identify, history and enduring values?
Keeping it Together, Looking to the Future

- One of the most significant effects of the digital revolution has been to facilitate – and by facilitating to increase the influence of – the network as a model for human interaction.
Principles

- Integrity is a virtue that can be identified in complex structures of many kinds—from buildings to the human personality—where it signals the absence of segregation, discontinuity, or internal dissociation.

1. We are an institution devoted to the cultivation of human potential.

2. We will adopt a multidisciplinary perspective.

3. We will foster the distinct identity of this university, while at the same time continuing to recognize the importance of collaboration and dialogue with sister institutions.

4. We will place the highest value on original thought and on innovation.

5. We will ensure the integrity of our work by bringing a critical view to all of our practices—those which bear directly upon education and research as well as those less directly related.

6. Wherever possible, we will reduce or eliminate obstacles to cooperation.

7. We will acknowledge, and seek to integrate an obligation to serve the greater good of our community.
Priorities

- we will focus on three priorities: developing a distinct, effective and sustainable undergraduate experience, enhancing the way we see and build connections between McMaster and the community, and supporting continuing excellence in research.
The Student Experience

- For these reasons we must initiate a strategic and thoughtful institution-wide reconsideration of teaching practice and learning assumptions, from curriculum to delivery to program and even degree rules. Programs new and old should integrate three elements:

  1. **Experiential learning**
  2. Self-Directed Learning
  3. Interdisciplinarity
Community Engagement

- McMaster has demonstrated throughout its history that outstanding academic work can be an extraordinary force for the good of human beings, society, and nature; so our task in the future must be to consolidate and deepen that contribution. And rather than relegate community engagement to the status of a “free-floating add-on,” something we do on our own time, we need to integrate it fully and meaningfully into the work of the academy...

- a “genuine and long-overdue return to the civic mission of higher education."
Research

- In committing ourselves to a heightened level of community engagement we therefore commit ourselves unequivocally to even greater achievements in research.

- We reassert therefore our intention to be a student-centred research-intensive university.

- Alignment – of academic activities, resources, goals and premisses – is obviously critical if we are to maintain or increase our present level of research excellence; in fact, better alignment represents our greatest promise of increased success.
Internationalization

- Internationalization in the university cannot be one-sided. Internationalization of the university by the presence of foreign students, by faculty involvement in a network of research alliances abroad, by faculty and student travel for research and development purposes, and above all by the adoption of an internationalized perspective in curriculum and program design on our campus: this is not only desirable and appropriate to present circumstances, it is urgently needed.

- We need to embrace internationalization of this sort. The transformation of the university on its own ground, whereby our academic orientation and breadth of knowledge embraces the globe. The university must become different in the process of internationalizing itself. All of these principles converge in two: first, a commitment to building capacity in higher education systems across the world, and second, a commitment to encouraging global citizenship through education.

- Global citizenship is not a passive awareness but an active orientation to the challenges of the world.
To strengthen and enhance our place among the world’s top universities I believe we need to press forward vigorously to reconceive and then *reassert the integrity for which McMaster has traditionally been known.*

It is clear that in order for McMaster to preserve and advance its standing amongst the great universities, *we will need to reassess and reinvent much of what we do.*

During the last twelve months a serious public discussion has arisen around the issue of differentiation in the university sector. It is clear that in the coming year we will be called upon to identify our unique identity the success of McMaster has been the success of an *integrated and balanced model* of the academic mission.

My proposal to the University is that in the future we explicitly define ourselves as we have implicitly defined ourselves in the past, as a *university dedicated in the broadest sense to the integrity of the academic mission,* conforming to the principles and priorities that I have laid out here.
What do we need to do?

- **Universities are by their nature decentralized and intolerant of regimentation**, and that is as it should be. It is the wonderful paradox of intellectual discovery that linear progress depends upon a certain amount of lateral exploration, a reality that needs to be acknowledged in both our structures and our processes. At the same time we need to seek maximum alignment and integration.

- We need to initiate a full and radical assessment of our work in the three priority areas.

- Success in this transformation will come when we are all as individuals engaged in the process and **when mutual respect and cooperation bring us into optimal alignment**. Our civility, in short, will be our future.

- I ask all units in the university, especially the academic faculties, to consider both the drift and details of this letter and to assess the extent to which their activities answer or could be made to answer positively its message. What changes would be necessary, and what benefits could be expected? What would be the challenges in your particular context, and if those could be overcome, how? What are the obstacles to radical changes you might wish to implement? Where your work is already moving in this direction, what resources might you require to make significant progress?
Are we aligned? What are our goals in Administration?

- Provide direct support to University faculty/AVP strategies in support of the core academic/research mission.

- Develop and implement strategies to reduce the perceived “value gap” and build “trusted Advice”.

- Through responsible and sustainable financial management secure a solid foundation for the academic mission;

- Improve consultation and tools for effective financial management: core units and University.

- Continue top-tier labour relations practices;

- Provide a consistently reliable transaction support system e.g., payroll;

- Within budgetary constraints, selectively develop leading edge HR programs within a long-term ‘employer of choice’ strategy;
Are we aligned? What are our goals in Administration?

- Project manage new construction projects such that they are executed on a timely basis and within budget;
- Develop partnerships to leverage combined strengths and further McMaster Strategies;
- Develop plans to control growth in Utility costs;
- Within budgetary constraints develop best possible building maintenance programs;
- Create planning and property management function to improve/manage space utilization;
- Lead in and facilitate policy and process reviews to deliver greater efficiency and effectiveness;
- Champion Sustainability Program across campus;
- In preparation for IT and other strategies improve University change readiness;
- Encourage engagement throughout division in University and external citizenship;
- Support vision of expanded relationship with City of Hamilton;
- Provide the leadership and develop the environment and culture to ensure goal congruence and employee satisfaction.
Are you aligned?

What are your goals?
Thank you for your attention
Where are we?
Where are we going?

Deidre Henne
1st Financial Leadership Conference: Aligning Finance with Strategy at McMaster
Nov 24, 2010

- Senior financial leaders
- Ron Joyce Centre
- Knowledge to lead
- Networking
- Promote continuing education

1st Financial Administrators Forum: Aligning Admin with Strategy at McMaster
April 7, 2011

- All other financial systems users
- MUSC - on campus
- Knowledge to do
- Networking
- Promote continuing education
VISION 2020 (UTS)

**People**

Working Together
Collaborative Spirit
Timely Feedback
Active Engagement
Change Oriented

**Debt Management**
Bring a critical view to all of our current practices

**Deferred Maintenance Plan**
Reduce or eliminate obstacles to cooperation

**Post-Retirement**
Integrating what stays with new systems

**Financial Administrators Forum**
Aligning Administration with Strategy @ McMaster

**Refined Processes**
Modified & New training responding to needs

**Simplified “Policies & Processes**
Seek to integrate in areas appropriate to better serve

**Modified & New training**
Aligning resources with strategic direction

**Oracle**
On line Cashiering
Payment Cards
SAS FM
Trust Administration
Subcodes
Buying 101

People

Devoted to the cultivation of human potential

Focused toward multi-disciplinary teams to solve problems

Affirmed Objectives

Active Engagement

Learning, collaborating, with sister institutions

Building on growing knowledge leading to better plans

Respecting the past and building new innovative plans to fund our future

Building on multi-disciplinary teams to solve problems

Integrated what stays with new systems

Reduce or eliminate obstacles to cooperation

“Simplified “Policies & Processes

Modified & New training responding to needs

Seek to integrate in areas appropriate to better serve

Aligning resources with strategic direction

Oracle
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Budget Model
Task Force
Khaled Hassanein
BMTF II Mandate

- Budget Model Task Force I (BMTF) provided the following mandate for Task Force II (BMTF II):

  “The overall aim of this effort is to take the BMTF I report recommendations and move forward to develop a version of an activity-based budget system that fully supports and enhances McMaster’s academic mission.”
Activity Based Budgeting

- **Faculties (and research institutes) move to activity based budgets**
  - Receive all income arising from their activities
  - Responsible for direct and overhead expenses
- **Service units remain on incremental budgets**
- **A highly decentralized model that is thought to**
  - Increase budget awareness and assign fiscal responsibility/accountability to appropriate levels
  - Increase transparency & trust
  - Support long term planning
  - Encourage innovation
- **It requires**
  - Intensive high quality data
  - Additional skill sets for administrators
- **Could result in silos if not designed and managed appropriately**
BMTF II Membership

- Barb Campbell (Office of the Provost)
- Iain Clarkson (BMTF II Analyst) --- replaced Wenny Li (BMTF II Analyst)
- Linda Coslovi (Engineering)
- Ross Gardner (Health Sciences)
- Brooke Gordon (School of Graduate Studies)
- Khaled Hassanein – BMTF II Chair
- Mary Law (University Budget Committee)--- replaced Abigail Payne (University Budget Committee)
- Ying Liu (IRA) --- Replaced Sam Curtin (IRA)
- Kim MacDonald – BMTF II Project Manager
- John McKay (Advancement)
- Barb McKenna (Research and International Affairs)
- Karen Menard (IRA)
- Lou Mitton (Financial Services)
- Gina Robinson (Student Services)
- Lilian Scime (Financial Services), left University Jan. 2011
- Julianne Simpson (Administrative support)
BMTF II Advisory Board

BMTF II provided updates to an executive committee of Vice-Presidents and Deans for information and feedback as appropriate milestones were reached.

Presentations were also made to a Directors of Administration forum to get their feedback.
Principles developed by Task Force I:

- Promote transparency, trust and engagement
- Assure financial responsibility, accountability and fairness
- Advance the efficient use of physical and human resources
- Have predictability and stability
- Enable innovation, creativity and change
- Assign fiscal and academic responsibility to the appropriate levels
- Build the student learning experience both inside and outside the classroom
- Enable rapid response to opportunities
- Ensure the sustainability of areas of existing and emerging excellence in keeping with academic priorities
Additional guidelines by BMTF II

- Supports and enhances the academic mission (research and teaching)
- Avoid the creation of “silos” and promote interfaculty / department cooperation
- Keep things simple, not too many variables
- Utilize the concept of “materiality” – spend time on large items, set a limit under which the item will not form part of the components of a budget model
- Simple to administer with
Structure of the Proposed Model

Revenue
- Tuition
  - UG Tuition
  - Grad Tuition
- MTCU Grants
  - BOG
  - UG Accessibility & Grad Expansion
  - Quality
  - Performance
  - Nursing / UG Med Expansion / Clinical
  - Special Purpose
  - Special Access
  - Disability Access
  - OGSST (non-operating)
- Indirect Cost of Research
  - FICR
  - CRC
  - ROIE
  - ORF-IC
  - ERA and other
  - Centres of Excellence
  - Research Contract
  - Royalties
- Other Income

Activity Units
- Faculties
  - Business
  - Engineering
  - FHS
  - Humanity
  - Science
  - Social Science
  - Interdisciplinary
- Other
  - Research Institutes
  - Ancillaries

Allocation
- Direct Distribution

Net Expense from Non-Activity Units
- Administration
- VP Research
- IT
- Student Affairs
- Scholarships

Other Direct Expenses
- Salaries and Benefits
- Other Divisional Expenses

Occupancy Cost
- Utilities
- Maintenance & Custodial

Admin / Service Units (Overhead)

University Fund
Progress-to-date

- Completed a review of revenue distribution options and made recommendations on a methodology for each revenue type
- Completed a review of allocation methodology for occupancy costs and Admin/Service units costs
- Proposed the establishment and use of a University Fund to support strategic initiatives and to facilitate the move to the new budget model during the transition period
- Proposed initial suggestions regarding appropriate governance mechanism for new model
- Identified outstanding issues and proposed next steps
- Issued a final report to President Dean
  - Available through the Provost’s web page
Next Steps …

- **A shadow budget exercise over a two year period is proposed:**
  - Use most up-to-date data to better understand implications of new budget model
  - Hold detailed discussions between Service Units and Faculties to ensure an understanding of costs allocated and services provided
  - Develop appropriate tools to help administer with new model
  - Develop appropriate training programs to help ease the transition to new model

- **Feedback from McMaster’s Community → BMTF2@mcmaster.ca**

- **Next phase led by Barb Campbell & Deidre Henne**

- **Once the objectives of the shadow budget process have been achieved:**
  - McMaster will be in a position to determine whether the new budget model should be implemented and if so,
  - Identify a strategy for a smooth transition to the new model
Break
Update: Systems Renewal

ERP – Fred Hall
Reporting Strategies – Karen Menard
ERP & Change Management – Teal McAteer
Update: Systems Renewal Enterprise Resource Planning

Fred Hall
Update: Systems Renewal
Institutional Reporting Strategy

Karen Menard
Background

- The Reporting Strategy, lead by the Institutional Research and Analysis (IRA) department and supported by University Technology Services (UTS), will help McMaster set a business direction and priority with respect to institution-wide reporting, as it will define the reporting "universe" at McMaster and then provide a more in-depth assessment of the current state and stakeholder requirements as it relates to key information (e.g., student financial, research and so on).

- This strategy will focus on enterprise wide reporting mechanisms with a strong focus on academic data relating to Faculties and students including an analysis of how reporting processes are carried out by Faculties and Departments.

- Deloitte has conducted working sessions with the following stakeholders to discuss the current state and desired future state of institutional reporting:
  - President and Vice-Chancellor
  - Provost and Vice-President (Academic)
  - Vice-President Research and International Affairs
  - Vice-President Administration
  - DeGroote School of Business
  - Faculty of Engineering
  - Faculty of Health Sciences
  - Faculty of Humanities
  - Faculty of Science
  - Faculty of Social Sciences
  - School of Graduate Studies
  - Registrar’s Office
  - Research Office for Administration, Development & Support
  - Financial Services
  - Human Resource Services
  - University Technology Services
  - ATS/Budget Task Force
  - Institutional Research and Analysis
Assessment of Reporting Challenges

Current Reporting Environment

Institutional Reporting
- Summarized and cross sectional reporting
- Relies on transactional and operational reporting
- Significant data collection and cleansing
- Raw data transformed for reporting requirements
- Limited capacity to take on new requirements
- Insufficient access to institutional systems
- Under leveraged technology

Operational Reporting
- Departmental data collection and reporting
- Significant amount of excel, some access databases
- Some faculties have built "side systems" to satisfy needs
- Sporadic access to institutional systems
- Requirements not fully defined and are ad-hoc in nature
- Lack of trust in transactional data and reports
- Tremendous thirst for data, information, intelligence
- Sense of information access being over-controlled

Transactional Reporting
- Aged systems that don’t meet current requirements
- Lack of data definition and consistency
- Records are not integrated across applications
- Lack of data governance
- Some faculty processing/collection

Transactional Systems
- Central Systems (FAS, SIS, HRIS)
- Other Systems (SGS, Faculty, etc)
Conceptual End State – Managed and Integrated Environment

Future State Reporting Environment

- Data Repository
- Defined Data Model
- Defined Data Governance framework
- Defined Data Access and Ownership
- Adherence to Institution wide Data Standards

Central Systems (FAS, SIS, MacVIP) Other Systems (SGS, Faculty, etc)

SAS End User Tools
- Institutional Reporting
  - Internal reporting within Faculties, Departments
  - More timely access to information
  - Enhanced capability to report combined results and stats
  - Capacity for modeling, forecasting, activity based budgeting
- Operational Reporting
- Transactional Reporting

- External and internal consolidated reporting with drill down capability
- Enhanced timeliness and accuracy of data
- Extra capacity for value added analytics
- Data integrity and cleansing re-allocated to source

- BI environment to fulfill all levels of requirements
- Drill down functionality for enhanced analytics
- Reporting requirements defined and supported from transactional systems upward
- Enhanced timeliness and accuracy of data
- Extra capacity for value added analytics
- Data integrity and cleansing re-allocated to source
What will this mean to you?

- Upon implementation, the institutional data management and reporting model will provide:
  - Self Service
  - Centralized repository of student, faculty, staff, research and financial data
  - Publicly available external data for comparison purposes, possibly summary G13 data
  - Defined and governed data model, dictionary and validation procedures
  - Multi-year history for trending analysis and year over year comparisons
  - Structured data in defined “cubes” for defined Self Service analytics
  - Operational Data Stores to replicate unstructured legacy and ERP data for mining purposes
  - Flexible tools for end users to access directly
  - Defined access management procedures and protocols for sharing
  - A platform for archiving legacy history upon conversion to new ERP systems
Working Together: People, Innovation and Technology

Dr. Joe Kim
Psychology, Neuroscience & Behaviour
Instructional Design Challenge

3192
OMG DID U C?
LOL, TTYL... L8R

From anywhere... De partout...
to anyone jusqu'à vous
Stakeholders
The Innovative Learning Initiative:

...incorporate digital technologies such as social networking, multimedia creations, mobile computing and emerging technologies into the teaching and learning process.

...the challenge is to develop and implement new strategies for educating these technology savvy students to prepare them for the 21st century.
1 boardgame: 12.95

1 iPad: 719.00
2 iPhones: 800.00
“When we understand that slide, we’ll have won the war.”
The traditional lecture-based course design is...traditional.
Chemicals are ideal for biological systems.

- Genetic:
  - Often permanent
  - All or none in scope
  - Tied to particular multiple modifications

- Chemical:
  - Seconds timescale
  - Tunable spec
  - Functionality

- A young minor process begins: he becomes a mess.

- pH 7.52, Hg, HCO

- He recovers.

- Erthrocytes (RBC)

- 45% of whole blood

- Erythrocytes

- Polycistrone vs. Monocistrone

- Trytophan syn...
Change the structure of delivering primary course material.
Lectures are typically designed as the point of primary content delivery.
Rethink how class time is used.
Lectures as material to be transcribed…
Small group experiences foster social interaction and discovery.
Invest in research, training and development.
Systems Renewal: ERP and Change Management

Teal McAteer
“Success in this transformation will come when we are all, as individuals, engaged in the process and when mutual respect and cooperation bring us into optimal alignment. Our civility, in short, will be our future.”

Patrick Deane
President and Vice Chancellor
September 21, 2011
ERP, Change Management and President Deane’s Vision

Change Management Focus

• The 2020 Systems Renewal Mission allows an opportunity to transform the systems and collaborative work processes of the University

• And in doing so, we will transform our culture by gaining the knowledge and skills to enhance alignment, engagement and cooperation
Change Management and the Systems Renewal Journey

- 2020 Systems Renewal Mission, Objectives and Principles
- Change Readiness Assessment Conducted
- Project Governance Renewed
- Change Management Strategy Developed
- SRSC Change and Leadership Training Launched

Next Steps - develop training plan and content
Later Today We Will . . .

- Review the principles of Alignment and Engagement
- Give you an opportunity to align the Finance Community’s work with a successful ERP implementation
- Review the importance of teamwork in the Finance Community and the University
- Review the Change Management strategy to support ERP implementation
- Review the ERP Training Plans
- Understand how the Finance Community can contribute to the challenges President Deane posed in his “Forward with Integrity: A Letter to the McMaster Community”
BREAK
Key Success Factors and Lessons Learned
Queen’s University Administrative Systems Replacement Project

Jim Carse | QUASR Program Director
Rick Palmer | Director, QUASR Sustainment
Heather Woermke | Controller
Patrick Legresley | Associate Director Finance, Queen’s School of Business

November 29, 2011

Photo Credit: Greg Black/Queen’s University
By 2005, we realized we were at the edge of a precipice.

The problem of ... Aged administrative systems

Seriously limited ... The delivery of services

And compromised ... Support for our academic mission

The solution was ... Administrative systems replacement

Which benefits ... Stakeholders across the Queen’s community

And enhances ... The academic experience at Queen’s
By 2005, we realized we were at the edge of a precipice and needed to enhance service delivery by:

- Replacing aged legacy systems
- Integrating solutions across departments
- Increasing system functionality
- Improving administrative processes
- Building ongoing support capacities
- Reducing and managing risks
Our Quest

✓ Supporting the University’s academic mission
  ▶ Redesigning processes
  ▶ Reducing risks
  ▶ Integrating systems

✓ Improving service delivery

Photo Credits: stock.xchng
Board approval was received December 5, 2008.
Governance

- Senior sponsorship and engagement on Executive Steering Committee
- Advisory teams of key stakeholders, mirror structure of project teams

**Key challenge**

Well-defined decision making authority, with decisions formalized in writing
Initial Challenges - Finance

- Pros and cons to being first – sets tone and expectations for remainder of project
- Difficult but critical to get structure of Chart of Accounts right
- Significant turnover of Finance leadership highlighted the need for engagement and alignment with business office
Initial Challenges - Student

Key challenge

Planning for change in advance

- Size and complexity of Student implementation
- Policy change to GPA significant – done well in advance

Photo Credit: stock.xchng
Initial Challenges – Human Resources

- Data conversion challenging
- Change brings focus on consistency of HR practices

**Key challenge**

Managing anxiety surrounding payroll transition
Initial Challenges - IT

✓ Talent search – competitive market for specialized skill sets
✓ Competing demands on time across multiple streams

⇒ Key Challenge

Recruiting and retaining skilled employees

Image Credit: stock.xchng/ Dominik Gawarek
Initial Challenges – QUASR Sustainment

- Coordinating in a decentralized environment
- Negotiating budget, talent and timelines

**Key Challenge**

*Balancing competing demands between implementation and sustainment responsibilities until project is complete*
3 Critical Success Factors

1. Effective Change Management
2. Effective leadership and governance of the project
3. Proactive user engagement throughout the lifecycle of the project
Top 8 Lessons Learned

Reporting must be a key system deliverable.

Credit: Microsoft Clipart
Post-implementation support (expertise and budget) is a critical success factor.
Knowledge transfer is key – staff must know what the consultants know.
Top 8 Lessons Learned

5

Commit the right staff resources to the project.
New systems require operational process changes – map out what these might look like.
3

Post-implementation begins at the same time the project begins.

Credit: Microsoft Clipart
Top 8 Lessons Learned

Set realistic user expectations – anticipate the trough of despair.

Credit: Microsoft Clipart
Top 8 Lessons Learned

YOU CAN’T PLEASE EVERYONE!

Credit: Microsoft Clipart
We welcome your questions ...
Recap

✔ Engage early and often
✔ Plan for support
✔ It’s a people process – with lots of change

Photo Credit: Greg Black/Queen’s University
Lunch
Financial Leadership Conference:

*Working Together*

Aligning and Engaging The Finance Community

November 28, 2011
Conference Goals and Objectives

Goals

- To equip financial managers with the knowledge and motivation to lead McMaster to superior performance
- To foster strong relationships among McMaster’s financial managers that encourage cooperation and knowledge sharing
- To promote continuing education as a way of life for financial management, and in support of this to provide a professional development certificate for the conference

Objective #2

- To foster the team building and thinking that will be necessary to align financial professionals with organizational strategy, particularly as it applies to change management and the implementation of the financial component of McMaster’s ERP system
Alignment and Engagement Session Objectives

- Create a **shared understanding** of an **effective community of practice aligned** to business strategy
- Develop **commitments** and **guidelines** for how the **finance community** works together
- Reach agreement on **2-3 priority areas** where the **finance community** will focus its efforts to be optimally effective in supporting the ERP implementation
- Introduce the **change management strategy** for the ERP project
- Update the **training plan** for the ERP project
- **Link** Integrity and the ERP and **Tie it Together**
Why is a Community Important?

President Deane in his “Forward with Integrity” letter to the McMaster Community states...

“...our purpose as a community of diverse constituencies is qualitatively singular while being numerous in its manifestations.” (pg. 2)

And...

“...it is obvious that to succeed in circumstances such as presently exist, universities will need to maximize their internal coherence; they will need to ensure not only that their different constituencies are appropriately aligned, but also that the relationship of one part to the other is interactive, that internal boundaries are porous and a site for cooperation rather than separation.” (pg. 4)
In the new organization individual contributions will come as a result of understanding how one’s efforts coincide with others, how one’s objectives can be integrated with those of others, how one’s own point of view can be advanced at the same time that other points of view are understood and acknowledged, and how multiple motives and energies can be focused on a single performance objective.

In short, our contributions increasingly will come as a result of our ability to understand teams and teamwork.
Anatomy of a Healthy Team—
Building a Community of Practice Through Healthy Teams
Mindset Shift

Get ready to share...

The Finance Community is like... A slinky because...
Realize the Full Value of Teams

The whole is greater than the sum of its parts.

2 + 2 + 2 = 6
3 + 3 + 3 = 9
3 x 3 x 3 = 27

Personal growth
Improved alignment & dynamic

© Knightsbridge Human Capital Management Inc.
**Team Alignment & Engagement**

**Alignment** reflects the degree to which business units, departments, and teams in an organization are able to work together efficiently to implement the business strategy.

**Engagement** reflects the degree to which employees and stakeholders are deeply committed and personally invested in the success of the entire organization.

From *The Leadership Gap* (Weiss, Molinaro, 2005)
A high degree of alignment and engagement leads to a high performance team.

From The Leadership Gap (Weiss, Molinaro, 2005)
A Broader View of Teams

Where would you place the Finance Community?

From The Leadership Gap (Weiss, Molinaro, 2005)
The ERP Journey
The ERP Journey

What was your mandate?

Who were the major stakeholders?

What did you do to ensure your team was able to build an exceptional reputation (internally and externally)?

How did you evaluate success?

What behaviours do you think made you the most successful?

What was the impact on faculty, staff, students?
The Path Forward
What Will Help The Finance Community to Get There?

...
What Will Stop The Finance Community From Getting There?

...
What *Actions* Can The Finance Community Take to be Successful?

...
Change Management Strategy
Change Leadership Roles

- **Change Initiators – EC, SRSC, Advisory Committees**
  - Identifies need and vision
  - Acts as champion

- **Change Implementers – Functional Implementation Teams**
  - Chart the detailed path forward & make it happen
  - Nurture support and alleviate resistance

- **Change Facilitators – FI Team Leads, SRSC and EC**
  - Aids in analysis & issue management along the way
  - Provides advice and council

- **Change Recipients – Faculty and Administration Employees**
  - Those affected by the change
  - Have to alter behavior to ensure change success
Managing the Change Process

- Project Governance
- Measuring the Change
- Action Planning and Transition Management
- Gap Analysis
- Describe the Future State

Enabling and Sustaining People

- Recognition and Rewards
- Communications
- Training & Learning
- Leadership Capacity
The Change Management Process

Initial Organization Analysis
Understanding how Organizations Work and How to Change  Chapter 2

Initial Organization Analysis
Understanding the Forces for Change and the Organizational Situation  Chapter 3

Why Change?
Determining the need for change, determining the degree of choice about whether to change  Chapter 4

Defining the Desired Future State  Chapters 5, 6, 7, 8

Gap Analysis

Describing the Present State

Action Planning & Transition Management
Assessing the present in terms of the future to determine the work to be done  Chapter 9

Measuring the Change, Designing Effective Control Systems  Chapter 10

From Organizational Change; An action oriented toolkit (Cawsey, Deszca, Ingols, 2010)
Key Training Objectives

- The objective is to develop leadership and change management knowledge, skills and attributes in each team member
  - These skills will be specific to the change leadership roles
- Change Management technical skills will be based on a customized course developed Dr. Teal McAteer and the Centre for Leadership and Learning
  - This course will have 5-7 modules and will be based on Action Learning principles
- Leadership Development and Team Effectiveness skills will be based on the Knightsbridge Team Inoculation Process
- Initial focus within the Steering Committee, Advisory Committees and Functional Implementation Teams
- Once the ERP vendor is chosen, we collaborate with the SRSC to determine the training plan
Alignment and Engagement—

The Importance Of Working Together
Keeping It Together, Looking to the Future

- How does ERP align to the President’s Vision of:
  - Integrity
  - Our Principles
  - How We Work Together
Keeping It Together, Looking to the Future

...
The Paradox We Face
The Paradox of Intellectual Discovery and Alignment

President Deane’s thoughts on the Paradox of Intellectual Discovery and Alignment...

“It is the wonderful paradox of intellectual discovery that linear progress depends upon a certain amount of lateral exploration, a reality that needs to be acknowledged in both our structures and our processes. At the same time we need to seek maximum alignment and integration, which is less a consequence of regimentation than of rigour, of economy and creativity in the application of our thought and the allocation of our energies.” (pg. 13)
The Breathing Paradox

Inhaling

Exhaling
Managing the Breathing Paradox

- Do not solve by choosing to either inhale or exhale
- Manage it by getting the benefits of each while appreciating the limits of each
- It is not a static situation
- It is a process, an ongoing flow of shifting emphasis from one to the other and back again

From Polarity Management: Identifying and Managing Unsolvable Problems (Johnson, 1996)
Next Steps—
Personal Commitments
## Personal Commitments

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<th><strong>What</strong> - my personal commitment is...</th>
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<th><strong>How</strong> – I will accomplish my personal commitment by...</th>
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<th><strong>When</strong> – I will implement my commitment by...</th>
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We All Own a Piece of the Puzzle
Closing Remarks