Job Description

JOB TITLE: Chief of Staff

REPORTS TO: President and Vice Chancellor

JOBS REPORTING: Administrative Manager, Executive Assistant, Programs & Events

LOCATION: Main Campus

GRADE: USG 15

DEPARTMENT: Office of the President

DATE: April 1, 2017

PRIMARY PURPOSE: Reporting to the President, the Chief of Staff (COS) is the Director of the Office of the President and manages the business functions and planning for the Office by undertaking key process, communication, structure, core activities and improvement-focused projects that support the most effective and impactful delivery of the President’s strategic goals. The position supports the President across all of his/her responsibilities and takes a lead role in identifying strategic linkages between institutional portfolios and outside agencies. This role is intended to identify opportunities to grow the collaborative culture across the President’s senior executive team (PVP) and related teams. Institutional issues management is a critical function of the Chief of Staff demanding a high level of responsibility and responsiveness to ensure that the Office of the President is effective in carrying out the President’s mandate in a way which commands the respect of the University’s diverse constituencies and the external communities.

KEY ACCOUNTABILITIES:
Include 3-4 key accountabilities of the role. These key accountabilities should reflect 80%-90% of “what the job does not the “how”.

1. STRATEGIC SUPPORT –

- Participates and supports the President at executive level meetings, such as the President’s PVP meetings
- Undertakes investigative research when strict confidentiality dictates that all issues must be dealt with within the confines of the Office of the President, including all administrative aspects for complex or politically sensitive complaints submitted to the President’s Office
- Oversees key written communications to ensure that it accurately reflects the President’s position
- Maintains strong knowledge base of current UW programs, policies, resources and services, developing strong relationships with senior leadership to effectively liaise, anticipate issues and opportunities, and identify trends
- Provides information on the President’s engagement on international activities, on strategic and high-profile speaking engagements, nationally and internationally
- Conducts background research on important issues, anticipates the need for information. Gathers intelligence and environmental scanning of major initiatives and developments both on campus and externally to keep the President up-to-date on emerging issues
- Liaises with the Office of the General Counsel and Department of Human Resources when issues relating to performance management and employment contracts for Senior Administration need to be resolved. Works collaboratively with Media Relations, Communications, Community Relations & Events to deliver presidential statements, comments, messaging and events
- Leverages external relationships to support achievements of the University’s priorities.
- Identifies and cultivates relationships with key individuals in organizations and with other strategic partners who have objectives and interests that align with the UofW in existing or new areas of work.
- Fosters and develops effective liaison with key stakeholders including industry, alumni, donors, government and community partners in order to advance the University’s strategic relationships.
2. **RELATIONSHIP MANAGEMENT –**

- Supports the work of the President’s Team by identifying linkages and emerging issues and opportunities between administrative portfolios and by making recommendations that enhance systems/processes/programs that support the priorities of the President.
- Ensures effective communications and decision-making between and within the President’s Office and other executive offices and constituencies (Board of Governors, Vice-Presidents, Deans, Secretariat, Staff, Students, Faculty)
- Supports the Associate Provosts and Associate Vice-President’s on initiatives and issues management for the institution
- Fulfills a primary liaison role within the Office of the President and is responsible for coordinating with internal stakeholders such as: University Advancement, University Relations, Provost, AP Students, Waterloo International, the Office of Research, Secretariat, General Counsel, Finance & Administration, FEDS, GSA, Faculty, Staff and other community stakeholders
- Liaises with members of the Board of Governors and in particular, works closely with the Secretary of the Board, to ensure effective flow of information between the President’s Office, the Board and Senate and their respective committees.
  - Works on behalf of the President to develop or follow up on governance matters for the Board
  - Oversees both the timetable and preparation of key documents required by the Offices of the Vice-Presidents for the President in preparation for Board of Governors and Senate meetings
  - Accountable for the development of the President’s quarterly governance reporting on achievements, priorities, initiatives and actions
  - Assists the President with the process for nominating prospective governors and proposing appointments to board committees
  - Oversight of risk management with respect to the fiduciary responsibilities of the President
  - Provides guidance on how and when to deploy the President or members of the executive team in support of the University Relations strategic priorities. Works closely with the AVP Communications to identify opportunities for the President to improve UW’s sense of community, and building UW’s reputation provincially, nationally and internationally
  - Maintain a close working relationship with the VP UR, AVP Government Relations, Senior Director Community Relations, AVP Communications, Media Relations in order to advise the President on emerging issues related to internal and external initiatives and issues management
  - Oversees speechwriting services for the President
  - Liaises with the AVP, Waterloo International to facilitate connections for the President in order to build international presence through establishment of corporate partnerships, collaborative academic programs and joint research initiatives in priority markets
  - Liaises with VP Advancement, Advancement staff both centrally and faculty-based on how and when to engage the President on large gift prospects or stewardship opportunities
    - Works collaboratively with the President and Office of Advancement to coordinate internal and external communications to support a wide variety of activities involving the President.
    - Coordinates other activities related to the Office of the President to engage and inform the community, to enhance the University’s reputation and to promote and communicate the successes of academic plans, programs and activities

3. **ISSUES MANAGEMENT OVERSIGHT –**

- On behalf of the President triages issues of reputational significance to the University, and works with the various Vice-Presidents or their designates to proactively and reactively manage issues of a broad nature.
- Evaluates emerging and longer term opportunities and threats to achievement of the President’s priorities and critical success factors of the University
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- Identifies a portfolio which will have carriage of the issue; tracks the progress of the issue at critical points, disseminates and coordinates information regarding the issue, ensuring that progress is made and an updates provided to the President and Vice-Presidents
- Monitors campus activities and briefs the President as needed, with attention to implications from the standpoint of both internal and external stakeholders
- Communicates on the President’s behalf with various members of the executive team and governors as required
- Responds to and meets with broad range of internal and external individuals and groups, frequently related to matters of immediate concern, and coordinates responses, solutions, and follow-up with the President and other appropriate university officers. Reviews key communications with respect to issues to be published over the President’s signature

4. DIRECTOR OF THE OFFICE OF THE PRESIDENT

- Manages the operations and staff of the Office of the President, providing guidance, development and leadership within a high functioning team based environment.
- Manages a team of creative professionals, ensuring the highest standards for producing engaging, compelling and effective communications, ensuring objectives are fulfilled, shared and optimized across communications channels and ensuring project management, project deliverables, client relations and portfolio strategies are managed and completed successfully
- Assists in establishing priorities and agendas, researches issues of importance and sensitivity, and produces briefing materials and information on significant matters which require the President’s attention
- Interacts with administrators, faculty, staff and students to effect two-way communication between and amongst the President and members of the University community
- Ensures that appropriate responses on behalf of the President are prepared or delivered for inquiries, correspondence, complaints; or gathers appropriate background information for the President to make a decision
- Undertakes research and analysis to assists the President with correspondence, reports, policy documents and presentations.
- At the President’s request attends on/off campus meetings including Senate, Board of Governors, PVP and Executive Council as a resource for the President.
- Ensures that the office is functioning effectively and efficiently to support the work of the President
- Ensures that the President is appropriately prepared for meetings, events and other engagements. Ensures the President receives important policy documents, strategic reports, and prepares the same as required.
- Attends meetings with or on behalf of the President to ensure that appropriate follow up occurs and that the President is briefed on outcomes
- Provides oversight for the records and information management within the Office of the President in accordance with University records management and retention policies, guidelines and legislated requirements such as FIPPA

Human Resources

- Support the President in the recruitment, retention and alignment of senior leadership structure to meet strategic objectives and goals
- Develop processes and coordinate in consultation with the President, the annual work plans and assessment process for all direct reports to the President
- Provides oversight for all aspects of human resource management, development and staff relations for the Office of the President, including hiring, managing performance, disciplining and/or terminating employment as required; assigning and directing work; ensuring ongoing work quality assessment, conducting performance reviews and rewarding/recognizing and counselling employees ensuring the availability of skill development, coaching, mentoring and training opportunities, addressing concerns and resolving problems.
- Responsible for development of annual work plan for the Office of the President, Office Retreats, planning and measuring progress
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<th>Financial Management</th>
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<td>• Accountable for Office of President budget development, allocation and monitoring to determine if work processes or resource allocation require modification to meet defined budgets</td>
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<td>• Responsible for administration of all accounts for the Office of the President</td>
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<td>• Review all expense claims for Vice Presidents and Special Advisors for the President’s approval, approve all expenditures for the Office including review of expense claims made by the President ensuring compliance with policies and procedures.</td>
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<td>• Manage financial reporting for the President’s travel and entertainment expenses required for governance purposes</td>
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POSITION REQUIREMENTS:
If hiring today, what would be the minimum requirements?

Education: University degree, business administrative field preferred. Significant managerial and professional experience in support of a complex executive environment. Comprehensive understanding of the administrative, academic and governance structures of the University. Solid understanding of the external environment for universities within Canada and the Province (COU, UC, U15, Federal and Provincial Ministries, etc.)

Experience: Applicants must have experience in roles of progressive responsibility and senior administrative experience. Minimum (10) years of professional experience providing strategic, administrative and management in the office of a C-level executive or a large post-secondary institution. Must be able to quickly assimilate information, analyze data and be able to provide strategic advice, guidance and decisions on behalf of the Office of the President or the President as required. The highest ethical standards. Extensive knowledge of the University’s policies, procedures and operating requirements, and the academic culture on campus. Must be confident, organized, and an accomplished problem solver. Tact, judgment and diplomacy are essential. Advanced mediation, communication and relationship management skills including an ability to influence, negotiate and build productive working relationships with key stakeholders, senior university management and external partners to achieve required outcomes. Outstanding written skills in the preparation of papers and reports. Ability to identify opportunities and areas for improvement and initiate, lead and implement administrative and process reviews to achieve efficiency and service improvements. Highly developed people management and leadership skills with the demonstrated ability to develop and support a professional, service and continuous improvement focused workplace culture. Ability to think and act strategically, creatively and dynamically in a high pressure work environment. Ability to form relationships at senior levels of the Board and University (Deans and Vice-Presidents) to serve the mission of the University. Ability to make difficult and complex decisions with good judgment and with acute sensitivity to the political environment and to the reputation of the Office and the University. Strong analytical and financial skills to oversee budget portfolio, and to review and assess the budget implications of initiatives. Ability to manage confidential and sensitive materials and situations with the utmost discretion.

Technical: Job specific experience, computer skills

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<tr>
<th>MS Word</th>
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<tr>
<td>Advanced</td>
<td>Intermediate</td>
<td>Intermediate</td>
<td>Outlook - Advanced</td>
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NATURE AND SCOPE:

- **Interpersonal Skills:** (See above under experience and skills required)
- **Level of Responsibility:** (See Decision-making authority outlined below)
- **Decision-Making Authority:** Reports directly to the President. Significant level of responsibility and accountability to support the priorities of the President and the vision of the university. Often manages highly confidential issues for the President
- President’s Office staff report directly to the Chief of Staff, but the Chief of Staff also works very closely with all of the Vice-Presidents on high level issues
- Direct and primary responsibility for the operating budget of the Office of the President
- Highly complex issues are managed which may involve all levels of government, media, corporate leaders, opinion leaders, faculty, staff and students – often high risk of impact on institutional reputation if not managed well
- Issues have to be creatively managed by the Chief of Staff as generally each issue is new and unusual, very little of the work is routine in nature
- High level of involvement with foreign government agencies, corporations and people of influence at the international level
- Final decisions related to all operational, human resources, financial and communication activities of the Office of the President
- Decisions with respect to allocation of President’s time (fund-raising, government relations, senior committee meetings, social events, etc.)
- Provides guidance and problem solving support to the President and other senior administrators on a wide range of issues involving strategic and operational matters, which may include interpretation of policies and procedures, or which may require decisions for which no known precedent exists
- Determining what issues require the President’s time and what issues can be resolved by others;
- Manage initiatives on behalf of the President and advises the President and other senior leaders on matters related to programs, issues, policy and both internal and external relations
- Required to act on behalf of the President and serve as a liaison with campus leaders community members and the Board

- **Physical and Sensory Demands:** This position requires outstanding customer service, sound judgment, a strong work ethic, calm demeanour, ability to work under very challenging time constraints, constant interruptions and competing priorities. Extended time at a computer. Use of a blackberry allows the Chief of Staff to be accessible to the President at all times and beyond normal business hours. This position must be available to accommodate communications outside of a normal work week.

- **Working Environment:** Physical Risks – No significant risks Psychological Risks – Minimal exposure to disagreeable conditions typical of C-level office and of a supervisory position. Requires extended hours and beyond normal work schedules.