

JOB TITLE: Director, Strategic Planning and Evaluation **DATE:** June 23, 2017
REPORTS TO: Cross appointment to the Office of the President/Provost and Institutional Analysis & Planning
JOBS REPORTING: Manager, Evaluation & Accountability, Manager, Data Analytics & Reporting, Project Assistant, IAP
LOCATION: Main Campus
GRADE: USG 16 – 35 Hours per week
DEPARTMENT: Institutional Analysis & Planning

PRIMARY PURPOSE: Cross appointed between the Office of the President and Department of Institutional Analysis and Planning, the Director, Strategic Planning and Evaluation is responsible for the development and implementation of the University of Waterloo Strategic Plan, monitoring, and reporting on its progress and outcomes, and integrating various accountability measures into a comprehensive institutional accountability framework. Director, Strategic Planning and Evaluation works closely with the Executive and Senior Leadership from the Faculties and Academic Support Units, and Director of Institutional Analysis and Planning to implement and evaluate University of Waterloo's strategic directions. The Director, Strategic Planning and Evaluation ensures that these critical contributors are engaged, that the UW Strategic Plan and Faculty and Academic Support Units' strategic plans are aligned, and that the evidence produced in this process provides a sound base for executive decision making.

KEY ACCOUNTABILITIES:

1. Facilitates the development and implementation of the Strategic Plan for the University

- Establishes and implements a process and framework for strategic planning Develops and implements UW Strategic Plan based on evidence gathering and broad stakeholder participation, seeking input from all Faculties and Academic Support Units to work on the common set of strategic goals.
- Produces planning documents and facilitates the production of data that forms the foundation for monitoring plan outcomes.
- Directs the monitoring of, and reporting on, the UW Strategic Plan
- Prepares and coordinates risk assessment, risk management and risk reporting activities associated with the development and implementation of the university strategic plan
- Ensures information dissemination and broad consultation across the institution regarding planning, implementation and evaluation activities.
- Prepares and presents quarterly update reports to the Provost, Deans, Steering Committee (President and Vice Presidents), Senate Long range Planning, Senate, Executive Council and Student Relations committees
- Engages leadership (President's Office, Office of the Provost, Vice Presidents, Deans, Executive Council, and Academic Support units) in providing input and direction to strategic planning and monitoring activities.
- Provides counsel to the President, Provost and UW Strategic Plan leads on matters of plan development, implementation, strategic risk management and performance measurement
- Work closely with Associate Vice President, Marketing and Strategic Communications, to ensure all aspects of strategic planning and accountability reporting are communicated in a transparent and engaging fashion
- Working closely with Faculties and Academic Department leadership, ensures strategic planning activities across UW are done in a coordinated fashion and ensure effective implementation and alignment with the University strategic plan.
- Promotes and facilitates a culture of collaborative action on strategic directions and continuous learning and improvement

- Chairs and/or participates on related project teams; facilitates consultation; develops and implements plans of action to meet University strategic objectives; oversees background research; and coordinates external input and consultation, as required

2. Areas of Overlap between the role with Strategic Planning and IAP

- Monitors and incorporates new trends and best practices from leading academic environments to ensure UW achieves and retains its status as a globally recognized academic institution
- Employs a highly tuned facilitative approach in carrying out the day-to-day and strategic responsibilities;
- Continually seeks to learn and understand the data and information needs of employees, academic, and academic support leaders.
- Directs ongoing quantitative and qualitative data collection to inform various aspects of accountability reporting – from gathering baseline measures to monitoring progress and outcomes of specific actions relevant to the strategic plan and integrating those with other commonly reported accountability measures.
- Oversees analytical support, gathering of data, and information and the production of reports in support of the UW planning, decision-making and performance reporting.
- Responsible for verifying, understanding and explaining the use of university information in external contexts, including those related to national and international rankings and surveys
- Researches trends, innovations and best practices around accountability and performance reporting and recommends strategies for improvement to the Director;
- Prepares and delivers presentations at internal and external meetings or conferences;
- Coordinates, manages and/or advises on the initiation and implementation of research or evaluation projects that address institutional performance (e.g. socio economic impact study, community talent retention...)
- Coordinates and/or prepares briefing notes and compiles presentations for the President and Provost on a variety of topics.
- Issues Requests for Proposals; develops public proposal documents and evaluation methodologies; evaluates the proposals received; makes recommendations, as appropriate.
- Prepares and presents final reports, strategic action plans, and recommendations to the governance bodies and committees.
- Provides functional leadership on strategic projects that are influencing or are influenced by the UW strategic plan

3. The main areas of responsibilities with the Office of Institutional Analysis and Planning

a) Director Support

- Works with the Director to ensure the availability of a responsive data environment to facilitate university planning and operation;
- Provides backup to and represents the Director and office as required
- Advises and assists the Director in the development of long-range strategies and operational plans for the development of the office and the university and, where appropriate, assume responsibility for the monitoring of, and reporting on, the implementation of these plans;
- Participates in relevant internal and external committees and councils, or events, as required by the Director;
- Leads or co-leads specific projects, or undertakes other duties as required by the Director

b) Leadership and Supervision of Staff

- Provides administrative supervision, coaching and guidance to the Managers of Evaluation and Accountability and Data Analytics and Reporting
- Works with the Director and the Management team to establish priorities for the office

- Provides leadership regarding the reporting, analysis and planning of information and resources in functional areas as assigned;
- Participates in cross-functional management and project meetings to gain appropriate perspective and understanding of various inter-dependences related to UW performance and accountability
- Identifies opportunities for IAP participation and leadership opportunities on campus;
- Continually seeks to learn and understand the needs of the institution and how they relate to the role of IAP;
- Provides leadership, direction, consultation, expertise, guidance and/or facilitation to cross-divisional and/or cross-departmental project teams and Regional staff involved in corporate strategic initiatives.
- Oversees the selection and hiring of consultants; provides direction and ensures completion of work and performance in accordance with established work plans and budgets.

c) Content Areas

- Facilitates and/or oversees the processes that contribute to the preparation of key performance and accountability measures, including facilitation of the University Rankings Committee and the Survey Advisory Committee, and
- Liaises with Director and Senior Managers of Policy and Enrolment Planning and Budget and Resource Planning to exchange information, to gain insight into provincial and national projects, policy developments and contexts, and to assess and address impact on relevant projects
- Prepares and deliver presentations at internal and external meetings or conferences

d) Other Working Relationships

- Liaise with Senior Director, Community Relations and Government Relations to understand and incorporate external impacts and interdependences with the Strategic Plan.
- Works closely with Associate Vice President, Marketing and Strategic Communications, to ensure comprehensive and continuous communication of the university progress in achieving strategic goals.
- Develops productive, collegial working relationships with Faculty and Administrative department heads, to ensure IAP is informed of the needs, and strategic direction for those units we support

POSITION REQUIREMENTS:

Education: Graduate level degree in a relevant discipline

Experience: Extensive experience in applied research, strategic and operational planning, comprehensive and program evaluation, needs assessments, project management, and stakeholder engagement. Experience with survey processes and design, research ethics, as well as data sharing/use protocols. Experience with strategic and organizational planning required preferably in a post-secondary environment.

Knowledge, Skills and Abilities: A strong background in data collection and research methodologies, quantitative and qualitative data analysis, development of accountability frameworks, and decision support processes and systems. Ability to conceptualize data processes and analytical models as well as effectively direct and guide analytical stakeholders and data professionals. Extensive experience with MS Office and a working understanding of data management concepts and relevant analytical applications.

NATURE AND SCOPE:

Interpersonal Skills: Communication, facilitation, presentation, building consensus, diplomacy, problem solving, relationship building.

Level of Responsibility: Staff management, leadership, influencing, coaching, directing.



Decision-Making Authority: Operational authority to manage the institution's planning process under the direction of Senior Leadership.

Physical and Sensory Demands: Extensive computer use, prolonged sitting (e.g. office work, meetings)
Working Environment: Office-based work, with meetings across campus; occasional travel