

## NOTICE OF MEETING

There will be a meeting of the  
Senate Governance Committee  
on Wednesday, October 19, 2022  
2:00-3:30pm

LOCATION: Toldo Health Education Centre (Room 203)

## AGENDA

- 1 Approval of Agenda
- 2 Approval of the minutes of the meeting of September 26, 2022 SGC220926M
- 3 Business arising from the minutes
- 4 Outstanding Business
- 5 Reports/New Business
  - \*5.1 Senate Standing Committee – Membership Gordon-Approval  
SGC221019-5.1
  - \*5.2 Proposed Revisions to Bylaw 18 – Schedule A Dixon-Approval  
SGC221019-5.2
  - 5.3 Proposed Revisions to Bylaw 31 and Student Code of Conduct Dixon-Approval  
SGC221019-5.3
  - 5.4 Discussion on Bylaw 2 – Virtual Attendance Provisions for Senate Committees Dixon-Discussion  
SGC221019-5.4
  - 5.5 Discussion on Review of Registrar Portfolio Gordon-Discussion  
SGC221019-5.5
  - 5.6 Strategic Items for Senate Discussion Gordon-Discussion  
SGC220926-5.6
- 6 Question Period/Other Business
- 7 Adjournment

Please carefully review the 'starred' (\*) agenda items. As per the June 3, 2004 Senate resolution, 'starred' items will not be discussed during a scheduled meeting unless a member specifically requests that a 'starred' agenda item be 'unstarred', and therefore open for discussion/debate. This can be done any time before (by forwarding the request to the secretary) or during the meeting. By the end of the meeting, agenda items which remain 'starred' (\*) will be deemed approved or received.

**University of Windsor  
Senate Governance Committee**

**\*5.1: Senate Standing Committee Membership**

Item for: **Approval**

Forwarded by: **University Secretariat**

**MOTION: That the Senate Governance Committee recommend to Senate the approval of the following Senate Standing Committee membership:**

**Dr. Mitra Mirhassani, Faculty of Engineering, Representative-at-Large – Senate Governance Committee**

**University of Windsor  
Senate Governance Committee**

\*5.2:           **Proposed Revisions to Bylaw 18 – Schedule A**

Item for:       **Approval**

Forwarded by: **SGC Bylaw Review Committee**

**MOTION:   That proposed revisions to Bylaw 18 be approved.**

Proposed Revisions

*[revisions are in track changes]*

Schedule A – Duties and Responsibilities

Subject to determination by the Board and in consultation with the President, the Vice-President, Equity, Diversity and Inclusion shall:

- [...]
- take primary responsibility for leading policy development on human resource matters, and for implementing new, or maintaining current, University policy related to human resources.
- provide oversight of the Office of Human Resources including employee engagement, staff collective bargaining, professional development, staff compensation and benefits, and staff recruitment and retention.

**Rationale:**

- Changes reflect senior administrative/organizational structure changes.

University of Windsor  
Senate Governance Committee

5.3: Proposed Revisions to Bylaw 31 and Student Code of Conduct

Item for: Approval

Forwarded by: SGC Bylaw Review Committee

**MOTION 1: That the proposed revisions to the Student Code of Conduct be approved.**

Student Code of Conduct - Proposed Revisions  
*[revisions are in track changes]*

2. Application and Scope

This code applies to all students and student groups, including any person who is admitted to, or enrolled at, the University of Windsor in any capacity, full-time or part-time, pursuing credit or non-credit studies, whether or not the individual is currently registered in courses or is currently a candidate for a degree, diploma or certificate, including between semesters.

This code applies to:

- (a) conduct that occurs on the premises of the University or its federated and affiliated institutions; and
- (b) conduct that occurs off-campus and/or a virtual setting, when
  - i. the student is conducting University activities and the student is representing, or presenting themselves as a representative of, the University or a student group/organization;
  - ii. the student's actions or behaviour have, or might reasonably be seen to have, a negative impact on the University or on the rights of a member of the University community to use and enjoy the University's learning and working environments.
  - iii. the student's action gives them an unearned advantage in matters affecting their academic standing.

\*the policy also will be revised to ensure it is gender neutral.

**MOTION 2: That the proposed revisions to Bylaw 31 be approved.**

Bylaw 31 - Proposed Revisions  
*[revisions are in track changes]*

1.2 This bylaw applies to:

- all current students, including any person who is admitted to, or enrolled at, the University of Windsor in any capacity, full-time or part-time, pursuing credit or non-credit; except for students registered in the Faculty of Law (including students registered in dual degree or joint programs with the Faculty of Law) or students registered in the Schulich School of Medicine and Dentistry.
- individuals (current and former students) who are alleged to have committed an act of misconduct while they were registered as students; and
- students and applicants who are alleged to have committed an act of misconduct to obtain admission, readmission or registration.

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*Adjudicator* means the Dean or designate of the Dean who will normally act to investigate and adjudicate academic misconduct matters occurring in courses offered by their Faculty. In the case of Continuing Education studies, the Executive Director of Continuing Education shall act as adjudicator. Where the instructor reporting the misconduct is also the adjudicator who would normally be reviewing the matter, the Dean shall act in the adjudicator's place or designate another to act as adjudicator under this bylaw on that particular matter. In the event of the absence or inability to act of the adjudicator, the Dean shall act in the adjudicator's place or designate another to act as adjudicator under this bylaw. If the Dean or the Executive Director of Continuing Education is the instructor initiating the complaint, the Provost shall act as, or designate, an adjudicator. In the case of academic misconduct involving graduate students, the Dean of the Faculty of Graduate Studies or designate of the Dean of the Faculty of Graduate Studies will normally act to investigate and adjudicate such matters.

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\*the bylaw also will be revised to ensure it is gender neutral.

**Rationale:**

- The revisions to the Student Code of Conduct and Bylaw 31 provide clarity on the application and scope (explicitly noting the new reality of virtual classrooms, meetings, conferences, etc.), as well as provide consistency of processes for addressing student academic and non-academic misconduct matters, including ensuring that individuals taking courses through Continuing Education are held to the same conduct expectations and adjudication procedures as students pursuing undergraduate, graduate, or professional studies. As courses offered through Continuing Education are not governed by Senate and do not fall within a Faculty, the equivalent adjudicator is the Executive Director of Continuing Education.
- The revisions to the Code also require approval from the Board for non-academic misconduct matters.

**University of Windsor  
Senate Governance Committee**

5.4: **Discussion on Bylaw 2 – Virtual Attendance Provisions for Senate Committees**

Item for: **Discussion**

Forwarded by: **SGC Bylaw Review Committee**

At the October 2022 Senate meeting, there was significant discussion around the proposed 10% restriction for virtual attendance for meetings of Senate Committees. While some argued for allowing up to 30-50% to participate virtually, citing difficulty in achieving quorum and greater flexibility for members, it was also cautioned that a more conservative approach would be appropriate given the limited number of meeting rooms that allow for virtual attendance. It was stressed that individuals who are not feeling well should be focussing on their health and recovery and should not be working or participating in meetings (whether in-person or virtually).

It was also suggested that consideration be given to approving a change to the virtual Senate Committee meeting attendance for a set period, with the provisions to be reviewed for effectiveness upon expiry of the term.

While fully in-person and fully online meetings are fairly clear-cut, hybrid meetings raise logistical, implementation, and technical complications:

1. A minimum notice period for attending is needed in order to plan and meet bylaw requirements. If there is no notice and members start connecting virtually, exceeding the maximum percentage, those connecting after the maximum threshold has been reached will need to be removed from the meeting and will therefore be unable to participate. This may also affect quorum.
2. Not all areas will have access to a meeting room with the required technology.
3. Members may experience technical issues (sound, video, disconnection), and must understand that the meeting will continue provided there is quorum.
4. Cameras are to be on at all times to ensure member participation. If a member's video does not work (computer or bandwidth issues), they would be removed from the meeting.

NB: This proposal relates to Committees of Senate only (those created by bylaw of Senate). Under Bylaw 2, Senate meets in-person in room 203 Toldo.

The proposal presented at Senate was as follows:

**MOTION 1: That proposed revisions to Bylaw 2 be approved.**

Proposed Revisions

*[revisions are in track changes]*

I. Rules of Order for Senate Committees and Subcommittees

[...]

Normally, all meetings shall be held in-person and only members present shall be permitted to vote, subject to other bylaw provisions.

For All Senate Committees

Subject to other bylaw provisions, all meetings shall be normally held in person. A Chair may permit members to participate by videoconference (or other mechanism, which allows all members to see and hear each other), technology permitting, subject to the following:

- a) 10% of the voting membership may participate by videoconference. For the months of May-August, sessional lecturers and student members may participate by videoconference, in addition to the 10% of the voting membership.
- b) Requests to participate by videoconference are to be accompanied by a rationale for not attending in person and should be submitted at least 48 hours prior to the meeting. Requests will be assessed and approvals granted by the Chair.
- c) In the case of secret ballot votes, members participating by videoconference waive their right to anonymity and may submit their vote in confidence to the recording secretary.

Members participating by videoconference will have all the rights and responsibilities as those attending in person and will count towards quorum.

**Rationale:**

- Basing the number of members who can participate virtually on percentage of the total membership provides greater flexibility and fairness, given the varying sizes of committees and Councils. The 10% reinforces that members' default should be in-person attendance, with virtual attendance only in exceptional circumstances.

**Deleted:** For committees with seven or more members, no more than two members

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**Deleted:** <#>For committees with six or fewer members, no more than one member may participate by videoconference. For the months of May-August, sessional lecturers and student members may participate by videoconference, plus one other member. ¶

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**Deleted:** <#>(e.g., at a conference or other work-related activity)

**Deleted:** <#> on a first come, first serve basis

# **University of Windsor**

## **External Review of the Registrar's Office**

Spring 2022

**Confidential – not to be shared**



# University of Windsor

## External Review of the Registrar's Office

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### EXECUTIVE SUMMARY

In March 2022, Dr. Patti Weir, the Provost and Vice President Academic requested an external review of the Office of the Registrar to help inform the search for a new University Registrar and to identify opportunities to improve business processes, leverage technology, reimagine service delivery and understand the resources needed to achieve goals and support the team in the Registrar's Office.

In partnership with the AVP Enrolment Management the Provost wished to obtain feedback, recommendations and a roadmap to ensure the future success of the Office of the University Registrar (OTR) and the University. The review team was asked to review the structure of the office, business processes, and the tools & technology utilized by the OTR and was guided by the Terms of Reference (Appendix 1).

To support the review, three current University Registrar's from across Ontario were invited to participate.

**Angelique Saweczko**, University Registrar, University of Toronto

University Registrar at the University of Toronto. Angelique brings over two decades of post-secondary experience. Prior, she was the University Registrar at the University of Calgary, Thompson Rivers University and has worked at the University of Regina and York University. Ang holds a Masters of Education in Postsecondary Studies from Memorial University of Newfoundland.

**Geraldine Jones**, Registrar and AVP, Enrolment, Brock University

University Registrar and AVP, Enrolment at Brock University. Geraldine has led transformative change in admissions, client service/one-stop, grad studies.

**Ray Darling**, University Registrar, University of Guelph

University Registrar at the University of Guelph. Ray has been in this position since 2017. Prior, he was University Registrar at the University of Waterloo and Wilfrid Laurier University. Darling holds a Master of Arts in Political Science from the University of Guelph.

Participants were asked to provide feedback on the structure of the office, business process, tools and technology in the context of four questions:

1. What is working well in the Office of the Registrar right now?
2. What do you feel are best practices in registrarial functions?
3. What aspects of the Office of the Registrar could be improved?
4. What would be the ideal characteristics of the new Registrar?

Interviews were conducted between March 1, 2022 and May 4, 2022. There was a pause in the review between March 8 and April 18 as the university established an ad-hoc advisory group on the external engagement of the UTR through the Senate Governance committee to provide oversight in terms of due diligence of process and accountability.

Between March 1 and May 4, over 28 interviews were conducted via MS Teams involving more than 100 staff, faculty and students from across the university. A detailed list of stakeholders interviewed is provided in Appendix 2. In addition to interviews, a number of documents were provided to the review team to provide additional context for the review including a self-study of the registrar's office provided by the interim registrar, the IT strategy, various policies and procedure documents, the strategic enrolment management plan and the strategic mandate agreement to name a few. The full listing of supporting documents is provided in Appendix 3.

## Strengths

There is a tremendous amount of respect for the work in the Office of the Registrar (OTR) across the University of Windsor campus. Many stakeholders interviewed have a good understanding of aspects of the work conducted in the OTR and view the staff as friendly, hard-working and very knowledgeable. There is a strong sense of commitment by the staff to the OTR and the University of Windsor. Staff are known for taking pride in their work, and their desire to improve support for students.

It was highlighted that due to their expertise and collaborative nature, the OTR is often invited to provide input due to the value they add to the discussion.

The interim University Registrar, Lorraine was specifically mentioned on a number of occasions. Her dedication, support, efficiency and tireless efforts have been greatly appreciated by the campus community. She has made herself available for her team and the broader campus community to provide support, find creative solutions or to quickly address an issue. Several stakeholders highlighted that Lorraine is an incredible registrar and has created a more positive environment in the OTR.

Specific projects that positively impacted the campus community that were mentioned included:

- The OTR quickly and successfully switch to online/remote learning;
- There was good communication to keep students informed of what's going on and how things are working;
- The new waitlisting system is working well;
- There is good communication both to students and campus stakeholders;
- Transfer credit processes: shift to online workflows have made improvements;
- Move to online and self-service options for students has been positive;
- QR codes that help students access OTR staff.

While there were many strengths identified, the focus of the external review was to suggest opportunities for improvement and to highlight ideal characteristics for the registrar role to support the University of Windsor with the search for a new University Registrar. These are presented in the following sections.

## Overarching Observations

1. Organizational structure and reporting lines
2. Organizational structure for the Office of the Registrar
3. Office morale and workload
4. Systems and business processes
5. Scheduling
6. Data governance and reporting
7. Physical space
8. Communications

## Key Recommendations

Organized into High to Low and listed in rank order

### *High Priorities*

1. Reporting structure should be re-aligned and the Registrar should report directly to the Provost.
2. Invest in third-party support to finalize PeopleSoft UWin implementation.
3. Provide resources to support additional and ongoing training for staff on Campus Solutions competencies.
4. Provide resources to support team building/coaching initiatives with the Recruitment and Admissions units.
5. Address proliferation of leadership in acting/interim roles in the OTR.
6. Increase staffing levels in under-resourced areas.
7. Review and reconsider current customer ticketing service model.
8. Invest in the creation of a Data Strategy for the campus to create better business intelligence to inform decision making.
9. Consider moving the division of workload to, by Faculty, rather than alphabetical in Admissions and Records.

### *Medium-High Priority*

10. Create/update business process documentation.
11. Consider separation of admissions and records work.

### *Medium Priorities*

12. Consider investing in outside change management support to finalize InfoSilem implementation.
13. Consider LEAN process review/staffing in Admissions.
14. Improve morale through resources, professional development as well as proper staffing, technology and tools.
15. Address physical space issues.

### *Medium-Low Priority*

16. Consider implementation of 'Service Hub/One Stop'.

### *Low Priorities*

17. Consider moving Student Awards and Financial Aid to the OTR.
18. Develop OTR communications and outreach strategy.

19. Address course selection confusion by developing training materials/videos.
20. Address disconnects and the lack of communication with Academic Advising.
21. Clarify confusion regarding Activity Based Budgeting and impacts on OTR.

## Observations and Recommendations

### Theme 1 - Organizational Structure and Reporting Lines

#### *Observation*

There is widespread concern about the change of having the University Registrar report to the Associate Vice-President Enrolment Management rather than directly to the Provost and Vice-President Academic. It is generally viewed that the change undermined the role and importance of the role of the University Registrar. There were also concerns that academic integrity is taking a back seat to the enrolment imperative, in particular with international student enrolment. Several stakeholders mentioned that the current organizational structure would make it challenging to recruit a well-qualified candidate and undermine their ability for success in the role.

#### *Recommendation*

It is the strong recommendation of the External Review Committee that the University Registrar should report directly to the Provost and Vice-President Academic once again to improve the credibility of the role and the academic integrity of the portfolio. This can be accomplished in one of several ways structurally:

1. The University Registrar could report directly to the Provost at the same level as the AVP Enrolment Management; or
2. The two roles could be merged into one, as is the case at other Canadian universities. (ex. AVP Enrolment Services & University Registrar); or
3. The AVP Enrolment could report to the University Registrar, renamed Vice-Provost & University Registrar.

Given observations and feedback provided during the review process, the reviewers would recommend the third approach. This would encourage continued synergy between the two teams and also ensure that the leader is a member of the University Senate, thereby demonstrating the commitment to the academic integrity of the entire unit. Some possible organization structures are provided in Appendix 4. While there are currently well-respected leaders in place at this senior level, the reviewers also highlight the necessity to engage in an open competition for role(s) resulting from this structural change. **Priority - #1 (High)**

### Theme 2 - Organizational Structure of the Office of the Registrar

#### *Observation*

The current structure of the Office of the Registrar is one that has worked for the University of Windsor historically and has evolved over time. There are adjustments that could be made to further evolve the structure to better support students and staff members.

The combination of admissions and records functions into single positions is unusual as is organizing staff work alphabetically by student. An advantage of this approach is that a single staff member may work with an individual's file through the whole student life cycle. The disadvantage is that there is no down-time in the staff members work cycle and it is clearly creating bottlenecks in terms of service to prospective and current students. Staff members also have less depth of knowledge about individual faculties in this type of model.

The Hub is a student-service initiative that was started several years ago but was not fully implemented due to the Campus Solutions implementation project. There are issues in the Client Services unit of service delivery times, staff turnover and low morale.

In many universities, Student Awards & Financial Aid is part of the Registrar's Office in recognition of the key role financial aid plays in enrollment management and thus the connection with recruitment, admissions and registration. At some institutions, student billing is also part of the office. It is viewed as beneficial that both of these units are combined in their current location in the Finance and Administration portfolio.

### *Recommendations*

There is an immediate need to address the proliferation of OTR leadership roles that are acting/interim. The organization is vulnerable and ill-equipped to carry on operations efficiently in the absence of stability and clear accountability established through strength in the organizational structure. Succession planning is almost impossible in this environment as staff who have the potential to be future leaders are not given the opportunity to grow and develop professionally. **Priority - #5 (High)**

Serious consideration should be given to creating separate admissions and student records functions with an Associate Registrar leading each team. A division of responsibilities by Faculties instead of alphabetically would build degree specific expertise and is more in line with best practices at other institutions. It would be important to ensure that there are not single points of failure in this model with staff cross-trained to support each other. **Priority - #11 (Medium-High)**

The Systems & Records team could be renamed the Systems & Scheduling team to more accurately reflect the work they are doing. The Client Services unit on this team could be moved to the new Student Records team, although consideration could be given to having the leader of this unit report directly to the Registrar, in particular if other changes in the report are accepted and other units join the One-Stop office. **Priority - #11 (Medium)**

The systems team should receive additional training to build up their Campus Solutions competency and future hires should focus on business analyst skill sets. The systems team could also be built up to support the Recruitment and Admissions teams. **Priority - #3 (High)**

While a low priority and no doubt politically challenging, consideration should be given to having the Student Awards & Financial Aid unit join the Office of the Registrar team, thereby creating a powerhouse enrolment management team and aligning all enrolment related student services within one area of the university. **Priority - #17 (Low)**

## Theme 3 - Office Morale and Workload

### *Summary*

Many stakeholders commented on their perception that morale was quite low in the Office of the Registrar, in particular on the Client Services team, and that staff turnover was a concern. The organization chart shared with the reviewers showed that two of the five Client Services Specialist positions were indeed vacant. Several stakeholders also shared that they feel the staff on this team in general receive a lot of abuse from campus community members. There are clearly disconnects between the recruitment team and admissions team, with the former being very critical in their commentary on the latter over processing delays.

There are several single points of failure in the office, especially in leadership roles. The leadership team itself is mostly composed of acting staff, with the one seasoned and well-respected manager approaching retirement. As mentioned above, there are structural challenges that are preventing OTR staff from performing at a higher level and creating significant workload issues; the Admissions and Records Officers being a great example. These staff are also called on to help in the Client Services area as well. In other words, they are supporting the front office and back office in two distinctively different areas. It is little wonder they are unable to make quick admission decisions. There is a feeling in the Office of the Registrar that there is still a separation between the two formerly separate units and that they are not yet working as a team.

### *Recommendations*

Management should consider the introduction of a formalized business improvement process review such as LEAN. This may be especially beneficial in supporting potential future change in separating the admissions and expanding the automation of manual processes. The expertise could reside in the recommended Systems & Scheduling team portfolio but should also be incorporated in thinking of all OTR managers. **Priority - #13 (Medium)**

Pursuing other recommendations in this report related to structural change and systems development will undoubtedly help with morale issues as staff will be better able to perform their duties. A “Taking Stock” session was completed several years back, which was lauded, but there are questions about operationalization of the findings. A similar exercise might be undertaken again, especially if structural changes are pursued. **Priority - #14 (Medium)**

Even if they are not, a robust change management process should be put in place to support ongoing systems and staff changes. Team building activities between the recruitment and admissions team would be beneficial for them to better understand the challenges each are facing. **Priority - #4 (High)**

While professional development, training and reflective team-building sessions are key to high-functioning teams, morale is also dependent on proper staffing, technology and tools to ensure staff can succeed. Multiple interviewees commented on the basic lack of staffing. There are simply not enough qualified team members, especially in the admissions and systems areas, to effectively address volume and workload. **Priority - #6 (High)**

## Theme 4 - Systems and Business Process

### *Summary*

There is widespread dissatisfaction with the Student Information System, in spite of the fact that Campus Solutions is seen as an industry leader. There are major concerns with the Academic Advisement solution, which is difficult for advisors to use and misleading students in their degree completion. Registrarial staff are finding they have to move through several screens to complete tasks that could be completed in one or two screens in the past. There is a general feeling amongst stakeholders that systems were not properly or fully implemented.

### *Recommendations*

It is highly recommended that budget funding be set aside to fill gaps in the Campus Solutions implementation that were either completed or implemented incorrectly. Special attention should be given to Academic Advisement and operational reporting needs (process tracking, degree audit reports). **Priority - #2 (High)**

## Theme 5 - Scheduling

### *Summary*

While InfoSilem is generally viewed as being an improvement over what was used previously, it is noted that it is not being fully used at this point as it is not the Windsor culture to have a software system determine teaching location and time. At least one Faculty expressed interest in utilizing the algorithm in InfoSilem to optimize their class times and locations. InfoSilem is a powerful tool that allows campuses to maximize use of finite space and time. When implemented properly, it also creates efficiencies for staff involved in classroom scheduling while considering faculty preferences through the use of constraints.

### *Recommendations*

Consideration should be given to the full implementation of InfoSilem for the scheduling of classrooms at the University of Windsor. It will require senior level support and proper committee structures to ensure full engagement and buy-in from Faculties. **Priority - #12 (Medium)**

## Theme 6 - Data Governance and Reporting

### *Summary*

There is great frustration with the state of data reporting in the new system with the loss of Crystal Reports. The Power BI tool is a solid one but like other software solutions, it has not been fully utilized nor has the querying capabilities built directly within Campus Solutions. Institutional Analysis focuses on historical, government and financial reporting. Enrolment reporting resides in the Office of the Registrar

### *Recommendations*

The University should consider a data strategy exercise to better define how they identify, store, provision, process and govern information. This exercise should identify which office should do what and what tools should be used. **Priority - #8 (High)**

There is also an immediate need for operational reports within the registrar's office and institutional reports on admissions, registration and scheduling. There is an indication this functionality was lost during the Campus Solutions implementation resulting in stakeholders' feeling backward momentum that improving reporting would improve. **Priority - #2 (High)**

## Theme 7 - Physical Space

### *Summary*

The physical space occupied by the Office of the Registrar was described by one campus stakeholder as an "abomination", a sentiment that was shared by those inside and outside of the office. There were questions about asbestos and it was described as dirty. Especially concerning is the space occupied by Client Services. An inferior work environment leads to issues with service, morale and team building. The University is implementing a Work-From-Home policy that may lessen the need for physical space if widely adopted in the office, leading to hoteling.

### *Recommendations*

It is recommended that the University at least focus on a renovated Hub for student services so as to present an attractive front-end for students. Equally important is back-office space that inspires creativity and makes staff want to come to campus and collaborate. **Priority #15 & 16 (Medium)**

## Theme 8 - Communications

### Summary

Stakeholders reflected positively about individuals in the Office of the Registrar with whom they interacted, especially Lorraine Chandler, but many admitted to being unclear about what the office does overall. One described the office as having a “Wizard of Oz” aura about it.

### Recommendations

The Office of the Registrar should create an internal communications plan to regularly report to campus stakeholders about their operations and projects. The Office may want to consider establishing an annual impact report. **Priority - #18 (Low)**

## SUMMARY OF RECOMMENDATIONS

#	Recommendation	Priority
1	The reporting structure should be re-aligned and the Registrar should report directly to the Provost. This better aligns core business functions and creates clarity of leadership and accountability. Would afford greater synergy of purpose for OTR and work in support of the entire student experience, both prospective and current students.	High
2	Invest in third-party support to finalize PeopleSoft UWin implementation. Address inaccurate and incomplete reporting functionality. System support requires sufficient staff (both volume and expertise) to manage on-going updates.	High
3	Provide resources to support additional and on-going training for staff on Campus Solutions competencies.	High
4	Senior administration should provide resources to support team building/coaching initiatives with the Recruitment and Admissions units. The current siloed organization and focus on recruitment as the primary enrolment activity has fostered a disconnect between these two teams. This has fostered a culture of “us” and “them” impacting positive and effective collaboration.	High
5	Address proliferation of leadership in acting/interim roles in the OTR. Roles need to be permanently and appropriately filled to begin establishing stability.	High



6	Increase staffing levels in under-resourced areas. This will help in daily management of workload and will foster staff retention. There are not enough people to successfully manage overall volume and work in the OTR.	High
7	Review and reconsider current customer ticketing service model. Since the launch of UWin the proliferation of tickets from students, staff and faculty is unmanageable. This could benefit from LEAN process review.	High
8	Invest in the creation of a Data Strategy for the campus to create better business intelligence to inform decision making. Consider division of roles/responsibilities between OTR and Institutional Analysis. Could PowerBI be leveraged more to support reporting needs.	High
9	Consider moving to workload division by Faculty rather than alphabetical in Admissions and Records. This may facilitate more equitable workload between colleagues and develop flexibility and nimbleness, avoiding single points of failure.	High
10	Create/update business process documentation. The OTR should inventory all critical processes and create a repository for reference and cross-training. Knowledge about certain critical processes resides with individuals who have tremendous depth and breadth. This fosters a single point of failure and limits succession planning.	Medium-High
11	Consider separation of admissions and records work. Create back-office roles that specialize in function.	Medium-High
12	Consider investing in outside change management support to finalize InfoSilem implementation. Tool is underutilized and campus-wide scheduling is still highly manual. Senior Administration needs to champion new approach/scheduling principles.	Medium
13	Consider LEAN process review/staffing in Admissions to review reported delays in Admissions decisions.	Medium

14	Improve morale by providing resources to host 'taking stock' session, one or two staff retreats. Professional development, training and reflective team-building sessions. While these are key to high-functioning teams, morale is also depending on proper staffing, technology and tools to ensure staff can succeed.	Medium
15	Address physical space issues. Attempt to co-locate members of the OTR, particularly units that have significant overlap. Existing office space is inefficient and claustrophobic. Consider how WFH may assist with space through hoteling.	Medium
16	Consider implementation of 'Service Hub/One Stop'. Include participation of critical front facing units to address student servicing needs.	Medium-Low
17	Consider moving Student Awards and Financial Aid to the OTR. Current disconnect could benefit from alignment under academic purview and being led by the OTR would improve customer service for students. Better supports an overall Strategic Enrolment Management approach.	Low
18	Develop OTR communications and outreach strategy. Internal communications rely on informal interpersonal relationships and "key" people. OTR needs to communicate what they are doing and critical timelines.	Low
19	Address course selection confusion by developing training materials/videos.	Low
20	Address disconnects and a lack of communication with Academic Advising by regularly attending advising meetings. Consider developing a community of practice.	Low
21	Clarify confusion regarding Activity Based Budgeting and impacts on OTR. Review revenue and expenses flowing in/out of OTR (i.e. transcript revenues). While out of scope of this review, the topic of ABB arose such that the reviewers recommend this is an area that may warrant more attention from senior administration.	Low

## **New Registrar: Skill Set and Characteristics**

We understand that Dr. Weir and Dr. Busch are looking to this report to help inform the selection process for the new Registrar at the University of Windsor. Registrar's act as the connection between academic and administrative aspects of university operations. The role requires a breadth of skills and understanding to protect data, maintain integrity and support student services and their various educational pathways. Historically the registrar's work in curriculum cataloging and management, registration, degree audit and record-keeping reflect stable core job elements. However, increasingly the strategic imperatives of post-secondary education intersect with these traditional elements of the role, amplifying and elevating it into a lynchpin position on the leadership team of a campus. To this end, beyond core executive leadership competencies, it is recommended that the University of Windsor Registrar, should:

- model holistic and systematic thinking
- be a strategic leader and an operational expert
- model innovation and thought leadership in registrarial functions
- bring a culture of evidence-informed decision-making
- have experience leveraging technology and data to create efficiencies and improved services and supports for students
- incorporate an equity, diversity and inclusion perspective to the OTR
- understand the core concepts in Strategic Enrolment Management in the context of the Registrar's Office and beyond
- understand the union environment
- Foster a culture of caring and collaboration within the office and with campus stakeholders

## **CLOSING REMARKS**

It is widely conveyed that the Office of the Registrar is doing an admirable job with the resources it has. Colleagues across campus commented on the job knowledge, dedication and work ethic demonstrated by staff who are engaged and committed to Windsor's mission. Positive comments in particular were heard about current interim leadership, with acknowledgment that positive change was already felt amongst the office staff under their tenure. There is general respect and support for the work of the Office of the Registrar across the stakeholders interviewed.

Change in a structure like that of a Registrar's Office can be challenging. The University of Windsor's OTR has experienced significant and understandable upheaval with the implementation of a new student information system. The recommendations and opportunities suggested through this review illustrate the need for further transformation in the OTR in alignment with the system change, along with the possibilities that a more holistic approach and further support may

provide. The OTR provides continuity over time as academic leaders move in and out of term leadership roles within their programs and faculty. The OTR needs to be trusted as a reliable source of institutional history with an invaluable pan-university view. Its structure should provide academic leaders with context and perspective around policy and processes.

It has been a pleasure to learn more about the University of Windsor, and in concluding this report we would like to wish Dr. Weir and the team the best of luck in the search for a new registrar.

# APPENDICES

## Appendix 1: Terms of Reference

**Context:** Building off the “taking stock” initiative and supporting our next University Registrar, we seek to undertake an external review of the Office of the Registrar (RO).

We want to learn about new ways of doing business, support our team, understand and benchmark resource requirements, prioritize, leverage technology, and reimagine services – all while keeping the university’s mandate.

The demands on the RO are enormous and will continue to grow - so what does an optimal RO for UWin need to look like (people, scope, tech, automation) to meet or exceed the demands and be positioned for the future? It cannot be a report but a roadmap informed by data and effective practice that paves the way to finalize the leadership.

**Preferred Timing:** Before the appointment of the University Registrar. It is a natural opportunity to examine and re-event.

### **Review Team:**

**Ray Darling**, Registrar at University of Guelph

Ray is currently Registrar at the University of Guelph and has been in this position since 2017. Prior, he was Registrar at the University of Waterloo and Wilfrid Laurier University. Darling holds a Master of Arts in Political Science from the University of Guelph.

**Angelique (Ange) Saweczko**, Registrar at University of Toronto

Ang is the Registrar at the University of Toronto. Ang brings over two decades of postsecondary enrolment services experience, having served at York, the University of Regina, Thompson Rivers, and the University of Calgary. She has extensive expertise in financial aid and awards, records and registration, student systems and scheduling, and curriculum governance.

**Geraldine Jones**, Registrar and AVP, Enrolment at Brock University

Geraldine is Registrar and AVP, Enrolment at Brock University and has led transformative change in admissions, client service/one-stop, grad studies.

### **Areas of focus:**

- What should and could the RO look like? What does not belong (e.g., Test Centre, etc.), and how does this office support enrolment management?
- How does the structure inform workflow? We want to move towards a “HUB model,” including Enrolment Services, Student Awards and Cashiers; however, we need to reconcile with a matrix reporting structure
- Evaluation of core operational pieces and identify weaknesses and gaps (e.g., the structure of admissions officer’s jobs, staffing levels, client service, opportunities to automate, opportunities for cross-functional training; graduate/law admissions and intersection with the graduate admissions office, management of conditional admissions)

- Ideas on how to implement more efficient registration procedures and policies
- Are there methods that we could employ to improve customer service delivered to internal and external stakeholders via traditional and electronic/virtual services
- Are there opportunities to advance Equity, Diversity, and Inclusivity in our admissions practices, policies, and practices?
- How can we access and leverage data for better enrollment reporting and analytics (deficiencies and identifying priorities) and improve compliance with federal, state/provincial regulations?
- What technologies should be adopted to support internal business processes and delivery of services (e.g., MyCreds.ca)?
- Evaluation of student-facing communications (e.g., offer letters (cumbersome), email templates, website, etc.) – are they learner-centric, align to student marketing and communications, and timely, especially in the context of the student life-cycle
- Methods to enhance and streamline graduation processes and who should support this

**Guiding Principles:**

We seek to develop a road map that leverages the following guiding principles:

- Puts the needs and expectations of today’s students at the centre
- Ensures flexibility - a long-term solution that remains responsive to the needs of the campus stakeholders and can evolve with changing technology, behaviours, best practices, etc.
- Clearly defines and communicates the service and processing expectations, including clarifying the roles and responsibilities concerning delivery of service
- Enables and fosters collaboration and shared accountability
- Leverages enterprise-class technology by building off investments across UWinsite (e.g., Finance, Student, Service, and Engage) and other platforms (e.g., QLess) to strengthen service delivery, campus-community experience
- Identifies opportunities for internal and external stakeholders’ engagement and consultation
- Supports efforts to create a diverse and welcoming campus community for all students.

## Appendix 2: Interviewee and Schedule

Name/Unit	Title or Role
Patti Weir	Interim Provost and Vice-President Academic
Edwin Tam	AVP, Academic and Quality Assurance
Penny Kollar	Institutional Quality Assurance Process
Phebe Lam	Acting Associate Vice-President, Student Experience
Mike Houston	Director, Student Accessibility Services And Academic Advising Centre
Cindy Crump	Director, Student Success And Leadership Centre
Beth Oakley	Director, International Student Centre
Chris Busch	AVP, Enrolment Management
Lorraine Chandler	Interim University Registrar
Susan Holiga	Acting Associate Registrar, Systems & Records
Darryl Danelon	Assistant Registrar - Undergraduate Admissions
Mark Trudell	Manager, Graduate And Professional Studies
Marie Hawkins	Director, Graduate Academic Services
Marian Doll	Director, Student Awards and Financial Aid
Chris Lanoue	Manager, Financial Services
Tina Pavicic	Manager, Student Accounts And Receivables
Various team members	Graduate Admissions (RO Team)
Various team members	Undergraduate Admissions (RO Team)
Various team members	Scheduling (RO Team)
Various team members	Systems and records (RO Team)
Various team members	Client Services (RO Team)
Chris O'Gorman	Academic Advisor Coordinator
Danielle Matias	Academic Advisor- Transfer Student Support
Denis Tetreault	Academic Advisor
Bethany Marcuz	Academic Advisor, Business
George Zhou	Associate Dean, Education
Francine Herlehy	Academic Advisor, Law
Susan Fox	Academic Advisor, Nursing
Fran Meloche	Academic Advisor, Nursing
Jennifer Johrendt	Academic Advisor, Engineering
Randy Bower	Academic Advisor, Engineering
Paul Henshaw	Academic Advisor, Engineering
Faouzi Ghrib	Academic Advisor, Engineering
Leo Oriet	Academic Advisor, Engineering
Mitra Mirhassani	Academic Advisor, Engineering
Ofelia Jianu	Academic Advisor, Engineering

Nicholas Eaves	Academic Advisor, Engineering
Tiffany Martindale	Academic Advisor, Human Kinetics
Phil Dutton	Academic Advisor and Associate Dean, Science
Julie Smit	Academic Advisor, Biology
Tanya Noel	Academic Advisor, Biology
Isabelle Barrette-Ng	Academic Advisor, Biology
Holger Eichhorn	Academic Advisor, Chemistry and Biochemistry
Zhuo Wang	Academic Advisor, Chemistry and Biochemistry
Otis Vacratsis	Academic Advisor, Chemistry and Biochemistry
Sirinart Ananvoranich	Academic Advisor, Chemistry and Biochemistry
Imran Ahmad	Academic Advisor, School of Computer Science
Alice Grgicak-Mannion	Academic Advisor, School of the Environment
Maria Cioppa	Academic Advisor, School of the Environment
Steven Rehse	Academic Advisor, Physics
Justin Lariviere	Academic Advisor, Math
Nurlan Turdaliev	Academic Advisor, Economics
Danielle Soulliere	Academic Advisor, Faculty of Arts, Humanities and Social Sciences
Kyle Asquith	Academic Advisor, Communications, Media and Film
Johanna Frank	Academic Advisor, Communications, Media and Film
Nicole Markotic	Academic Advisor, English
Heather Metcalf	Academic Advisor, Sociology
Kai Hildebrandt	Academic Advisor, Psychology
Jill Grant	Academic Advisor, Social Work
Lionel Walsh	Academic Advisor, Dramatic Art
Tina Pugliese	Academic Advisor, Dramatic Art
Guillaume Teasdale	Academic Advisor, History
Shauna Huffaker	Academic Advisor, Arts and Science
Mustapha Hamil	Academic Advisor, Languages, Literatures, Cultures
Jeremy Worth	Academic Advisor, Languages, Literatures, Cultures
Victor Sevillano	Academic Advisor, Languages, Literatures, Cultures
Robert Weir	Academic Advisor, Languages, Literatures, Cultures
Jeff Noonan	Academic Advisor, Philosophy
Jamey Essex	Academic Advisor, Political Science
Nicholas Papador	Academic Advisor, School of the Creative Arts
Brandi Lucier	Academic Advisor, Women's and Gender Studies
Danielle Reaume	Academic Advisor, Women's and Gender Studies
Debbie Kane	Acting Dean, Faculty of Graduate Studies
Lori Buchanan	Associate Dean, Faculty of Graduate Studies
Chitra Rangan	Acting Associate Dean, Faculty of Graduate Studies
Marie Hawkins	Director, Graduate Academic Services



Ericka Kustra	Director, Centre For Teaching And Learning (CTL)
Ryan Kenney	Executive Director, Information Technology Services
John Osborne	Assistant Director, ITS - Bus. Sys Group
Rose Zanutto	Executive Director, Institutional Analysis
John Dube	Institutional Analyst - Accountability
Barb Reaburn	Institutional Analyst
Academic Deans	Dean, Faculty of Human Kinetics
	Dean, Faculty of Engineering
	Dean, Faculty of Science
	Dean, Odette School of Business
	Dean, Faculty of Nursing
	Dean, Faculty of Arts, Humanities and Social Sciences
	Dean, Faculty of Law
	Dean, Faculty of Education
Associate Deans	Associate Dean, Faculty of Human Kinetics
	Associate Dean, Faculty of Engineering
	Associate Dean, Faculty of Science
	Associate Dean, Odette School of Business
	Associate Dean, Faculty of Nursing
	Associate Dean, Faculty of Arts, Humanities and Social Sciences
	Associate Dean, Faculty of Law
	Associate Dean, Faculty of Education
Student Union Representatives	President, UWSA
	President, OPUS
	President, GSS
Gillian Heisz	Associate Vice-President, Finance
Renee Wintermute	University Secretary
Renee Trombley	Executive Director
Jennie Atkins	Executive Director
Vincent Georgie	Associate Vice-President, External Affairs
Mark Learn	Human Resources

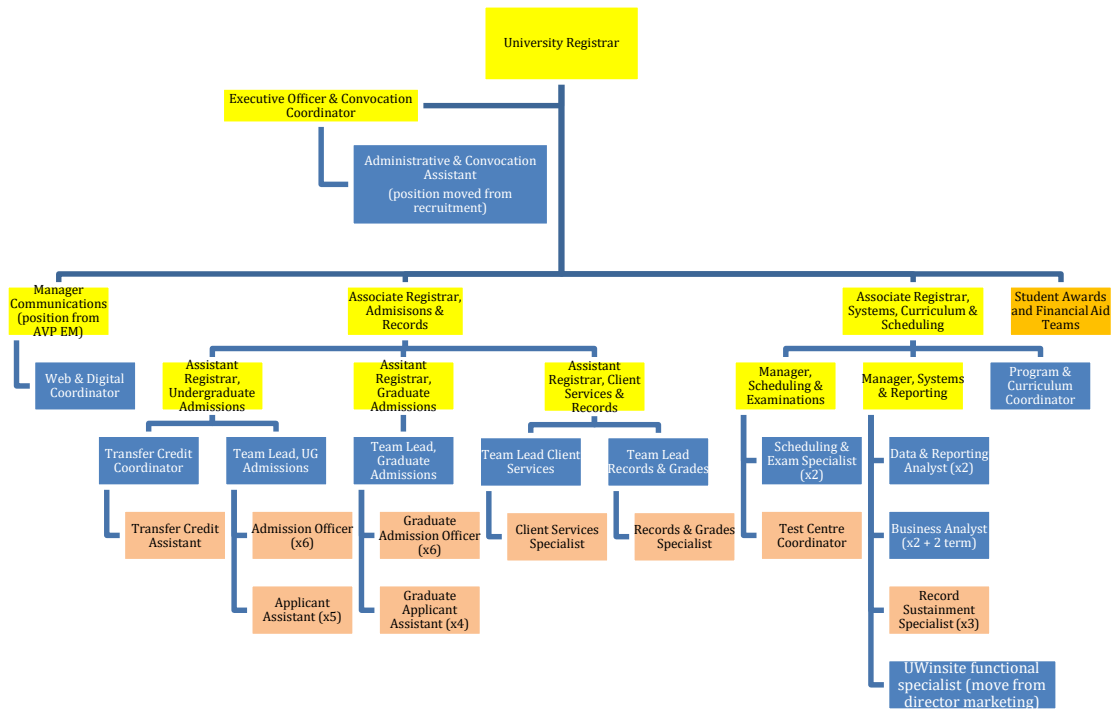
## Appendix 3: Documents Used to Inform the Review

- Admissions policies and practices
- Enrolment Management - Organizational Chart
- Implementation documents - UWinsite Student
- Implementation documents - UWinsite Student (change management)
- IT Strategy
- Job Descriptions: Office of the Registrar Team Members
- Key Performance Indicators
- Office of the Registrar - Floor Plans, Space Allocations, and Space Assignments
- Office of the Registrar - Mission, vision and values
- Office of the Registrar - Scope of Responsibilities
- One Hub Planning Documents
- Service Benchmarks
- Service Level Agreements
- Strategic Enrolment Management Plan
- Strategic Management Agreement (SMA 3)
- Summary of Flexible Work Committee (goals and objectives)
- University of Windsor Strategic Plan, incl. mission, vision, and values
- Video of Office of the Registrar (virtual tour)
- International Recruitment and Admissions Review

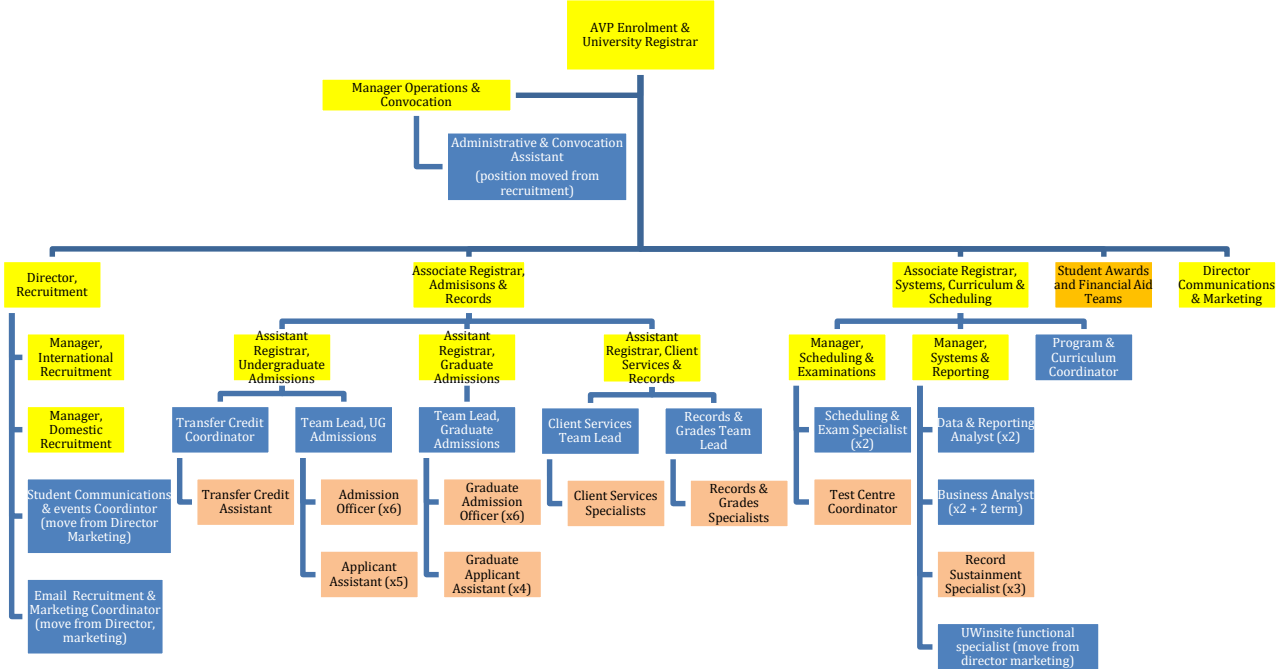
# Appendix 4: Possible Organizational Structures

The following are three possible organizational structures based on the leadership recommendations made in recommendation #1.

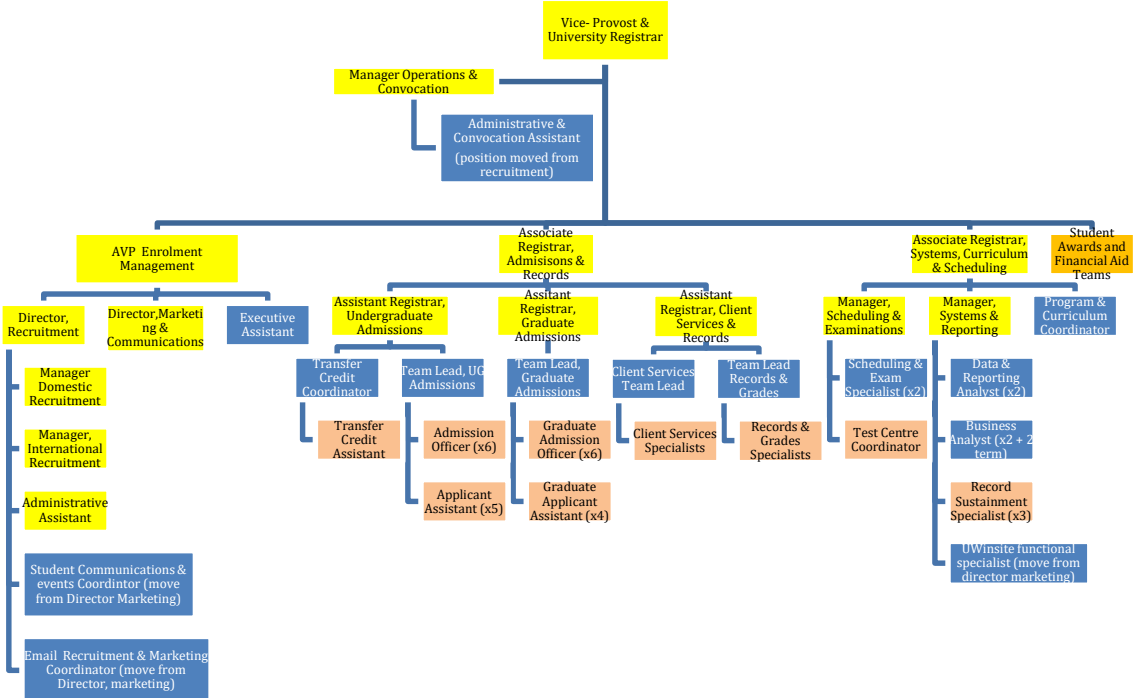
## Option 1: University Registrar Reports Directly to the Provost



**Option 2: Merge the AVP Enrolment and the University Registrar Positions**



**Option 3: The AVP Enrolment Reports to the Vice-Provost & University Registrar**



**University of Windsor  
Senate Governance Committee**

5.6: **Strategic Items for Senate Discussion**

Item for: **Discussion**

Current list of Strategic Items for Senate discussion

**November 4, 2022 Senate Information Session: Strategic Planning (virtual? – Ensures sufficient space given that it is open to all University community members)**

**December 2, 2022 Senate Information Session: Institutional and Research Data (data ethics) (virtual? – Ensures sufficient space given that it is open to all University community members)**

*Additional suggestions? Suggestions for order/scheduling of the following items? **Item for January SIS?***

- 1) Internationalization planning
- 2) Micro- Credential Framework
- 3) SETs
- 4) University and College Partnerships
- 5) Work Integrated Learning
- 6) Curriculum Development
- 7) Individual Faculty plans and strategies moving forward
- 8) Entrepreneurship
- 9) Knowledge mobilization
- 10) Continuing Education
- 11) Future of Education (open discussion on differing approaches to teaching, learning, and evaluations; the purpose of education; and what student success means)

Senate Information Sessions - 2:00-3:00pm

1. November 4, 2022
2. December 2, 2022
3. January 6, 2023
4. February 3, 2023
5. March 3, 2023
6. April 6, 2023
7. May 5, 2023
8. May 19, 2023