

Theme	Initiative
Accountability	Accountability <ul style="list-style-type: none"> •hold each other accountable for values •Highlight where our leaders are exhibiting the behaviors associated to our values •update metrics to encourage collaboration
Building relationships	DiSC - training and sharing styles and comparisons
Building relationships	Unit descriptions and Staff bios <ul style="list-style-type: none"> •clear roles and responsibilities - provide clear job descriptions when creating roles •help staff get to know each other, collaborate and who to go to for answers •Ongoing roles and responsibilities for the creation and maintenance of this information is pivotal for this to be of value •Knowledge Badges: Advancement is full of talented, knowledgeable staff, but how do we know what their skills are? By creating Knowledge Badges, perhaps adding them to searchable staff profiles in the Advancement Hub, staff could identify what they have knowledge about that other staff could ask for their assistance on.

Building relationships	Build relationships to build trust - get to know employees <ul style="list-style-type: none">•social engagement
Collaboration	Collaboration <ul style="list-style-type: none">•continue to work on removing silos by encouraging Advancement-wide collaboration•Track Collaboration in Advance: encourage and recognize collaboration efforts across campus, for example when collaboration occurs in a fundraising capacity, capture this on Advance in fundraiser metrics

Communication	<p>Encourage and solicit feedback, make it normal, recurring process:</p> <ul style="list-style-type: none"> •leaders should encourage and demonstrate they are receptive to critical feedback •leaders can prompt with questions: <ul style="list-style-type: none"> -What is the logic behind the idea and evidence to support it? -How do we actually implement the idea and overcome barriers? -How does this fit with our priorities or help other priorities? -What is new about this idea that we haven't tried before? •empower employee to provide a strong voice by: <ul style="list-style-type: none"> -providing rationale - evidence to build a case, shows leaders the impact -feasibility - time, resources, details -org Focus - collective benefit to the whole team, not just a few. -high novelty - clarify alternative perspectives, what make it unique and if org has tried the idea before •Acknowledge when feedback was accepted and used to improve work - Employees need to be encouraged to avoid taking feedback personally which reflects a Growth Mindset •Valuing historical knowledge from long-term employees <p>Not dismissing experience and lessons learned as "negative", but listen and learn for similar projects</p>
Communication	<p>All voices would have an opportunity to be heard and have their ideas considered and all levels of staff should be included in strategy/brainstorming meetings. Include new employees in planning processes so they gain a better understanding of how they will play a part.</p> <ul style="list-style-type: none"> •Could have quarterly sessions that all staff are invited to. Topic ideas would be submitted beforehand and provided early on so staff could decide which session they would like to attend, and so managers can identify where someone from their team should participate. A risk to this recommendation is that staff have differing perspectives and personalities and we would need someone to moderate the sessions.
Data	Enterprise Analytics - make use of analytics and demonstrate data driven decision making
EDII	<p>Ensure EDII considerations in all we do, communicate those considerations</p> <p>This could be better highlighted when ALT demonstrates this through their decision process</p>

Innovation	<p>Innovation</p> <ul style="list-style-type: none"> •Entrepreneurial mindset: Failure is okay and welcomed so you can learn, adapt and innovate •critical review, and communication, of initiatives or pilots that are not completed, discontinued •developing communities of practice, being industry leaders, not followers (benchmarking peers) •Create an Innovation Program application in the Hub to track the progress of ideas and allows for interactive feedback
Meeting norms	<p>Establish meeting norms</p> <ul style="list-style-type: none"> •Remote first principal •Recommit to free Monday's •Consider time zones of participants •Send the agenda 5 business days before •Have the right people •Reduce meeting times to 25-55 minutes •Be on time and prepared •Camera on •Mute when not speaking •Shake up meeting formats i.e. standing meetings, walking meetings <p>notice for in-person meeting</p>
Mental health and wellness	<p>Mental health and wellness</p> <ul style="list-style-type: none"> •Training programs, break the stigma – talk openly, mental health days/hours, peer recommended support list (counselling services, psychologists) •Meeting Free Monday's •Provide resources available to staff for mental health support and ensure transitional support in place for the return to work •training and awareness - period speakers, lunch and learns, leverage staff skills to offer learning sessions
Mental health and wellness	<p>Work life balance</p> <ul style="list-style-type: none"> •leaders need to model and encourage boundaries for work life balance •use outlook and teams to communicate hours •allow staff flexibility in setting hours •Training and empowering colleagues to better manage schedules

Planning	<ul style="list-style-type: none"> •Set clear objectives, priorities, and processes (i.e. ownership) and communicate •leaders should know the priorities of other areas •Continue to improve planning across depts so conflicting priorities are not as frequent •During the pandemic, lots of new and extra projects were added or responsibilities were shifted, but other deliverables were not removed •This one is two fold. We recommend working together across Advancement to build objectives to ensure alignment of priorities and availability. We also feel that all staff should have an objective related to Build a Better Workplace, for example: how each staff member has collaborated with others with a proven positive outcome, to keep it front of mind and ensure we continue to move forward.
Planning	Identify barriers that inhibit efficiency, let go of control - RACI framework to give more autonomy to staff for initiatives
Policies and procedures	Consistent policies and procedures
Recognition	<p>Employee recognition</p> <ul style="list-style-type: none"> •Employee spotlight a new and current employee in the newsletter •Performance (team and individual), tenure • Acknowledgement letters – end of probation, milestone service • Heney aligned with values and provide winners with access to leadership training • Develop transparent process of how employees are chosen for PD opportunities •implement easy, thoughtful ways to recognize colleagues contributing to different areas •Reward our smart, innovative and creative employees with in-house development •Promote from within by focusing on employee development to increase retention

Remote First Principals	Remote First Principals
Collaboration	List and offer tips and training on collaboration tools – ensure we have experts in house
Data	<p>Data storage and security – set standard expectations as to where it is stored, records retention- assign role in each department, BYOD, electronic information, disposal</p> <p>Develop policy that requires all technology used to store or transport Office of Advancement data assets to be assessed by the Service Desk</p> <p>Printing confidential/sensitive information should be done ONLY when needed</p> <p>Set norms across Advancement for direction of donations and legal documents while working remotely</p>
Development	<ul style="list-style-type: none"> •Central resource for all training opportunities and resources i.e. learning hub •Ensure core tools offered by Advancement are supported by strong training and subject matter experts

Equipment and Supplies	<ul style="list-style-type: none"> •Ensure everyone has what they need - laptop, carrying case, headphones- Laptop (also to be used when oncampus) or hybrid laptop/tablet •Create inventory •Process for replenishing employer-provided supplies chair, monitor, laptop, mouse. Keyboard, stationary, laptop and accessories •Enhance supply of back-up hardware <p>Suggested equipment - (Surface, iPad Pro), - Two 24- or 27- inch monitors, Docking station, Mouse, Keyboard, Shredder (or access to confidential shredding) and printer for purely remote workers)</p> <ul style="list-style-type: none"> •ergonomics of home set up
Planning	Events/Travel Calendar: Knowing which staff are going where and when can be useful to ensure collaboration of strategy occurs. A risk is that this will need constant updating and staff buy-in to maintain
Planning/Technology	Leverage work intake and task management software
Remote First Principals	Remote work - annual remote work arrangement contracts for staff
Technology	Adopt fusion teams, composed of IT and business stakeholders, for software purchases and management.
Technology	PCI remote friendly
Technology	1-800 number - need to be able to use remotely
Technology	Ensure inventory and process for allocating equipment and supplies to staff
Technology	Reduce # of printers and upgrade where possible. Reduced footprint means fewer printers are required

Technology/Communications	<ul style="list-style-type: none"> • Intranet • Creation of a searchable internal - Advancement knowledgebase Empower staff to answer their own questions and expand/retain institutional knowledge <p>Ongoing roles and responsibilities for the creation and maintenance of this information is pivotal for this to be of value</p> <ul style="list-style-type: none"> • Advancement communication, knowledge, applications, and file storage. Ensure users know where to go to find and share content
Volunteering	<p>Encourage volunteerism (internally and externally):</p> <ul style="list-style-type: none"> • Include volunteering for committees and being on hiring panels as a form of PD • Remove negative perception that if employees volunteer, they don't have enough work to do • Remove any feelings of obligation for employees who always volunteer • Determine why there is a need that some employees must be "voluntold"
Physical space	<p>Meeting rooms:</p> <p>Flexibility group:</p> <p>5 tables (4 people)</p> <p>2 private rooms (20 people)</p> <p>2 private rooms (10 people)</p> <p>Technology group: All boardrooms will be equipped with robust video conferencing technology</p> <p>Each room must have reliable Wi-Fi, microphones, audio, large televisions and webcams, wireless presentation system</p> <p>Collaboration group:</p> <p>Only a small percentage from the survey noted they would have in person meetings with more than 9 attendees. Therefore we recommend have more medium-sized spaces that could double as meeting rooms or interview rooms, with modular tables, already set up with tools to support collaboration, such as white board/smart board, camera, collaboration software, etc. We could utilize the university's central booking system and have it updated to include all spaces, along with capacity, photos, equipment available, etc.</p>
Physical space	<p>Flexibility group:</p> <ul style="list-style-type: none"> • Private pods - 25-30/private spaces • Coworking space - 25 open/shared table spaces <p>Technology Group: Hot seat, sit and go station sets up on campus - A set number of desks will need to have a docking station, 2x monitors and peripherals for Macs allowing hybrid users to seamlessly return to campus. Flex Desks workstation allow users to login and work (some redundancy will occur with respect to oncampus workstations and WFH set ups)</p>
Physical space	Staff lounge with large fridge, multiple tables to accommodate 20 people total
Physical space	<p>reception and guest area - to accommodate 30 people</p> <p>1 meeting room - 30 people</p> <p>5 tables in reception 4 people per table</p>
Physical space	outdoor space
Physical space	central printing, office supplies
Physical space	lockers

Physical space	parking
Physical space	Décor: Don't permanently brand but use accessories and swag to show Queen's spirit
Physical space	<p>Pick your mood space</p> <p>Private, collaborative, focused, quiet working spaces throughout the building such as telephone booths, comfortable and inviting spaces, breakout rooms, large and small meeting spaces, open format, dedicated/ongoing workspace for office regulars, pet friendly</p> <p>Increase the amount of natural space available to Advancement staff for formal and informal gatherings</p> <p>Picnic tables, patio, windows, spacious break rooms/lunchrooms, community garden</p>
Physical space	<p>Ensure building is properly maintained, clean, safe and COVID conscious</p> <p>Vacuuming, heating/cooling, push open doors, hand-soap and sanitation stations</p>
Physical space	<p>Introduce green/energy efficient technologies</p> <p>Automatic taps, compost, modernized heating/cooling, Queen's University Green Office Certification</p>
Physical space	<p>Accessibility</p> <p>Elevators, ramps, restrooms with space for wheelchair, adjustable desks, braille signage, captioning, transcripts</p>
Physical space	<p>Provide the Service Desk with permanent, physical space in new environment</p> <p>Dedicated space is required for set-up and maintenance of machines and storing an inventory of technology to support both the office and home environment</p>
Physical space/technology	Purchase workplace management software to allow staff to book desks, rooms, and tools while providing insight re: who is where and how space is utilized *
Technology	<p>Upgrade to a contemporary CRM (customer relationship management) system</p>
Technology	<p>Workplace Management Software: With staff working in different time zones and different hours in the day, working remotely or on campus, it will be tricky to find key collaborate time. Software that would make identifying availability as well as whether attendees are joining in person vs virtually and available spaces that fit the meeting needs is essential.</p>
Development	<p>Peer-to-peer network and mentoring</p> <p>Opt-in Wellness buddy</p>

Development	<p>Explore the need for full-time trainer/adoption specialist to support change readiness and use of tools</p> <p>Individual would provide training, develop documentation, and ensure Advancement maintains a relevant and up-to-date library of training to support staff</p> <p>Focus on continuous learning and skillset development</p>
Meeting norms	Maximize use of Outlook to allow staff to accept meetings as "in person" or "remote"
Mental health and wellness	<p>Flex hours and possibility fo working 4 days per week:</p> <p>35 hou work week</p> <p>28 hour work week</p>
Mental health and wellness	<p>Evolution of the PDP</p> <p>Personal wellness goals</p>
Mental health and wellness	<p>Reduce barriers and introduce physical fitness motivators</p> <p>Group exercise classes online/in-person, neighborhood/campus walking groups, treadmill desks, fitness challenges, discounted fitness memberships or apps (Couch to 5K), discounted electronics such as fitbits, Wellness Wednesday or time-blocking for fitness</p>
Mental health and wellness	<p>Wellness fund</p> <p>Dedicated and flexible budget for each employee, share stories in ALTogether Now</p>
Mental health and wellness	<p>Create mechanisms to monitor progress and mark wellness milestones</p> <p>How are we doing, are we on the right track, what have we missed, what can we do better, ensure there is room to evolve and change the wellness program over time, keep the conversation going</p>
Mental health and Wellness	<p>Training ideas:</p> <p>Expand training offerings beyond software. Consider topics that promote work-life balance, managing distractions, working from home, remote worker tax benefits, and work-specific content.</p> <p>Book club - Social responsibility/learning forum</p>
Planning	<p>Program Repository: Have a repository of programs with plans/resources that could be accessed by other areas so they aren't starting from scratch</p> <p>Project List: Have a list of current projects: purpose, outcomes, units/people involved, etc that all staff can view.</p> <p>For both of these repositories, if we want them to live on the Advancement Hub, the timeline would move out further, but to gather the list and perhaps store it on a shared drive or in SmartSheet, that could be done earlier.</p>

Planning	<p>Consultant: Our survey responses raised more questions than answers at times, and we wonder if perhaps we should have worded some questions differently. Survey results might also be different if asked at a different phase of the pandemic. We feel a consultant should be brought in to help better determine employee and spacing needs and help with the implementation of the recommendations.</p> <p>A risk for most of the items on this slide is that they require ownership and need to be maintained. There is also clean up required, such as moving file locations and removing passwords from existing documents.</p>
Technology	Collaborative Space Software: There is a need for a collaborative space where units can share what they are working on, showcase a new initiative or something that has gone well, toot their own horn, and ask questions of other staff/units. Ideally this space would allow everyone to share and brainstorm new ideas (example: ThoughtExchange).
Technology	Project Management Software: Software that would support collaboration and help with ensuring the right people are involved and peak busy times are considered
Technology	<p>Employees frustrated with implementations/ongoing support and maintenance of 3rd party tools</p> <p>Don't ask "what the other schools are doing" as often</p> <p>Ongoing benchmarking can hinder innovation</p> <p>Cheaper to build than to buy - and you get the product you truly want</p> <p>Example: Fund Reporting application was built in-house and has been very successful</p>
Technology	Virtual machine - can we log into a virtual machine rather than connecting to a physical computer that exists on campus
Technology	Explore need to extend Service Desk hours to support Advancement staff in different time zones
Technology	<p>Develop options for sharing content with external users (i.e., volunteers) that are not dependent on a specific person (i.e., permissions not tied to staff members OneDrive)</p> <p>OneDrive, with current permission structure, is a risk when sharing with external users</p> <p>- Identify a sharing solution that is not tied to a specific staff member</p> <p>Set standards for how documents are shared with internal and external stakeholders to Advancement (inside and outside of Queen's)</p>
Technology	<p>Purchase Adobe Acrobat Pro for all staff</p> <p>Adobe Sign for all signature workflow management</p> <p>Paperless first: standardize paperless processes and tools</p>
Technology	Speech-to-text software for efficiency with Contact Reports
Technology	Tools to transfer text messages to PC for efficiency with Contact Reports
Technology	Select software to allow for quick screen capture and video recording for easier support and collaboration

Volunteering	Create an employer-supported volunteer program Encourage staff to support the community, establish departmental partnerships with local organizations, share staff stories in ALTogether Now, support flex-time for volunteering
Equipment and Supplies	a stipend to offset office set up costs and ongoing technology
Mental health and wellness	Pet friendly workspaces might be considered in future
Mental health and wellness	Offer wellness support applications Corporate Partnership with Calm for Business Meditation, Sleep Stories, Music, Masterclass, Mindful Movement Gratitude Journal, Mood Check-Ins Family Access

Actionable now			MRP	Notes	Leadership	Collaboration	Culture	Flexibility
Now	September; April for metrics	Yes	Michelle	specific recommendations were not given	♦		✓	
Now	October	Yes	Deanna	<p>ACTION:</p> <ul style="list-style-type: none"> •ensure ALT is registered for MyEverythingDiSC.com •newsetter article about Catalyst and instructions for MyEverythingDiSC.com (ALT to register for it) •plan session for new staff (consider if there is in person "homecoming" for staff in October) <p>OTHER:</p>			✓	
Now	July /August	Yes	Deanna	<p>ACTION</p> <ul style="list-style-type: none"> •create bio template (survey) for staff to fill out for website (send Madelaine email June 24) •unit descriptions for onboarding to be updated/completed •ALT "speed networking" (Karen, Deanna and Michelle's completed) - sent email to ALT Jun 21 •Employee spotlight - include current employees - starting this with July 12 newsletter (kacey and Michelle are working on this) it will be up to ALT to keep track of their employees spotlighted <p>OTHER IDEAS:</p>	♦	✓	✓	

Now	December	Yes	Michelle	<p>Culture group didn't give specific recommendations</p> <p>ACTION:</p> <p>OTHER IDEAS:</p> <ul style="list-style-type: none"> •importance of onboarding, one to one meetings, team meetings, 2 word check in etc. •stay conversations - find a great framework here <p>https://www.shrm.org/resourcesandtools/hr-topics/employee-relations/pages/how-to-conduct-stay-interviews-part-2.aspx?utm_source=eabdb&utm_medium=email&utm_campaign=eabdb&utm_content=headline</p>	♦		✓	
Now	December ; April (Metrics)	Yes	Michelle	<p>specific recommendations were not given</p> <p>ACTION:</p> <p>OTHER IDEAS:</p>		✓	✓	

Now		Yes	Scott	<p>ACTION:</p> <ul style="list-style-type: none"> Leigh's newsletter June 28 to include link to Smith free webinar "How to find your voice and be heard at work" <p>https://smith.queensu.ca/insight/content/how-to-find-your-voice-and-be-heard-at-work.php</p> <p>OTHER IDEAS:</p> <ul style="list-style-type: none"> what about a "question of the week" in the newsletter (the podcast Michelle shared a long time ago talked about this - it demonstrates listening and receptivity to feedback, examples include: is your manager a simplifier or complexifier? (Amazon qustin - strategic - They want to implant an idea or a theme with their workforce that people can talk about. That got a lot of managers thinking, if you were the VP of Advancement what is one thing you would implement or do differently? rate ALT (member) on action statements? 	♦		✓	
Now		Yes	Scott	<p>ACTION:</p> <p>OTHER IDEAS:</p> <ul style="list-style-type: none"> debating topics openly brainstorming session invites - optional for staff to attend 		✓		
Now		Yes		<p>ACTION:</p> <p>OTHER IDEAS:</p> <ul style="list-style-type: none"> EAB article - Six data detractors 	♦		✓	
Now		Yes		<p>ACTION:</p> <p>OTHER IDEAS:</p>	♦		✓	

Now		Yes		ACTION: OTHER IDEAS:	♦		✓	
Now	July	Yes	Deanna	ACTION: •ALT Charter •newsletter article •manager meetings •determine consistent practise for travel cost reimbursement OTHER IDEAS:		✓	✓	✓
Now		Yes		ACTION: OTHER IDEAS: •We could have a health and wellness section in newsletter to list tips and resources, in-house training Managers take the Workplace Mental health Leadership certificate	♦			
Now		Yes	Leigh	ACTION: •ALT Charter (protect time to think and get work done, turnoff notifications, schedule delivery of non-urgent work emails, use teams and outlook to show work availability OTHER IDEAS: •	♦		✓	✓

Now		Yes	Deanna	<p>ACTION:</p> <ul style="list-style-type: none"> • ALT visit teams to share priorities • establish planning process <p>OTHER IDEAS:</p> <ul style="list-style-type: none"> • Have a place where staff can access priorities and status at any point 	♦	✓	✓	
Now		Yes		<p>ACTION:</p> <p>OTHER IDEAS:</p>	♦		✓	
Now		Yes		inventory of processes and documentation project will happen in 2021-22			✓	
Now		Yes	Deanna	<p>ACTION:</p> <ul style="list-style-type: none"> • Current employee spotlight each week - start on July 12 • Develop acknowledgement letters to mark end of probation and mark years of service (at milestone dates) • Ensure Heney aligns with values <p>OTHER IDEAS:</p> <ul style="list-style-type: none"> • Heney award winner opportunities 			✓	

Now		Yes		needs to be clearly defined, include papeless first principal https://www.peoplebox.ai/blog/remote-first-vs-remote-friendly-companies-whats-the-difference/#:~:text=Thus%2C%20it%20stands%20to%20reason%20that%20remote-first%20companies,be%20challenging%20in%20addition%20to%20having%20its%20advantages.				
Now				ACTION: OTHER IDEAS:		✓		
Now	September		Steve	BYOD - Simon and lesley working on this and expect it to be done by September. Master Data Management recommendations by December		✓		✓
Now			Deanna	ACTION: OTHER IDEAS:				

Now	October		Steve	<p>Informed by RWA survey</p> <ul style="list-style-type: none"> •reminder to staff about how to replenish supplies •Queen's will provide technology but staff responsible for home set up that includes chairs •need to ensure shredding procedures when working from home included 				✓
Now				<p>ACTION:</p> <p>OTHER IDEAS:</p>		✓		
Now				<p>ACTION:</p> <p>OTHER IDEAS:</p>				
Now				<p>ACTION:</p> <p>OTHER IDEAS:</p>				✓
Now				<p>ACTION:</p> <p>OTHER IDEAS:</p>				
Now			Steve	We want to explore with central PCI team and look at possibilities				
Now			Steve	<p>ACTION: Solution may lie in enterprise telephone solution - Advancement invited to that process to pilot potential outcomes</p> <p>OTHER IDEAS:</p>				
Now				<p>ACTION: Redundant item 24</p> <p>OTHER IDEAS:</p>				
Now				the extent to which we reduce further dependent on RWAs and space/capacity needs				

Now				Can we leverage QUIRC				
Now				ACTION: •highlight volunteerism in newsletter OTHER IDEAS: •encourage committee participation			✓	
On hold						✓		✓
On hold				https://hbr.org/2021/06/5-models-for-the-post-pandemic-workplace				✓
On hold								✓
On hold				additional 50 person capacity				✓
On hold								✓
On hold								✓
On hold								✓

On hold				university now offers daily rate				✓
On hold								✓
On hold								
On hold						✓		✓
On hold								
On hold								
On hold								
On hold				dependent on RWA				
On hold				will be included in technology roadmap				
On hold				I am not sure if this is needed with remote first principals plus if everyone sets their hours based on one time zone you will be able to see in outlook who is available.		✓		
tbd - no decision								

tbd - no decision								
tbd - no decision				need to consider remote first principals				
tbd - no decision								✓
tbd - no decision								
tbd - no decision								
tbd - no decision								
tbd - no decision								
tbd - no decision								
tbd - no decision				"Marketplace"		✓		

[illegible]

tbd - no decision				We can encourage volunteering, highlight volunteers, encourage and use committee involvement as PD				
x - not doing				<ul style="list-style-type: none"> •Advancement/Queen's cover cost of technology •Employees on an approved RWA are responsible for home office expenses other than computer/technology related equipment. The employee is responsible for their office furniture. The university still has the duty to accommodate ergonomic requests made by employees supported by underlying medical conditions. 				✓
x - not doing				only service dogs allowed in offices				✓
x - not doing				Lots of free apps				

Security		Technology		Wellness	
				✓	

	✓

	✓
	✓
	✓

✓	
✓	
✓	

✓	✓
✓	
✓	
✓	
✓	
✓	
✓	

✓	
✓	
✓	

	✓
	✓
	✓
	✓
✓	
✓	
✓	
	✓

✓	
✓	
	✓
	✓
	✓
	✓
✓	

✓	
✓	
✓	
✓	
✓	
✓	

	✓
✓	
	✓