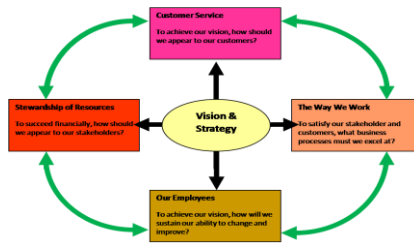


**Finance and Administration Division**  
**Strategic Planning**  
**Strategic Measures and Initiatives – 2009-2010**

Quadrant	Objective	Measure	Long Term Target	09/10 Results	09/10 Target	Initiatives	Accountability	Status
Customer Service	C.1: Provide quality, responsive, and helpful service.	Student customer satisfaction rating	All services at 8. or above	90% of services	7.5 or % of improved scores	C.1.1 Each major service within F&A obtain current information on the needs, and services offered to their customers. This may be completed by conducting focus groups or other information sources.	Directors	✓
		Employee customer satisfaction rating	All services at 8. or above	56% of services	7.5 or % of improved scores			
	C.2: Communicate quality, timely, and accurate information to customers.	Customer satisfaction rating	All services at 8. or above	50% of services	7.5 or % of improved scores	C.2.1 All departments will establish a monthly review process to ensure their websites are communicating current information.	Directors	✓
	C.3: Provide a safe campus.	Safety survey "Overall I feel safe while on Carleton's campus" rating	90% student/employees	Survey not implemented	85% student/employees	C.3.1 Conduct Personal Safety Survey.	VP (F&A)	C
Stewardship of Resources	F.1: Provide effective stewardship of university resources.	Annual, actual financial operating results for university compared to budgeted operating result.	Positive	Positive	Positive	F.1.1 Continue to monitor financial results on a continuous basis for university/division, and take appropriate action in order to meet the Board of Governors directive on debt reduction.	VP (F&A)	✓
		Successful delivery of Capital Programs.	% delivered on Time & on Budget	77% on Time 100% on budget	90% delivered on Time & on Budget	F.1.2 See attached list of Capital Programs.	AVP(FMP)	✓
		Develop a comprehensive Sustainability Initiative for F & A.	Implementation of Sustainability Initiative	In Progress	Complete	F.1.3 Operationalize approved recommendations from Sustainability Task Force report.	VP (F&A)	IP
		Initiatives established.	100%	In Progress	100%	F.1.4 All departments will establish a sustainability initiative.	Directors	IP
		Responsiveness of budget allocation to enrolment changes.	New budget process implemented	Complete	New budget process implemented	F.1.5 Implement enrolment-linked budget process.	VP (F&A)	✓
		Non-salary cost savings (operating)	5% Base	Complete	5% Base	F.1.6 All departments to complete a budget review.	Directors	✓
		Employee satisfaction rating (I'm encouraged to make suggestions)	TBD	Preliminary report communciated	Report on progress	F.1.7 Co-chair Task Force on Financial Resources	VP (F&A)	✓
		Number of Lean Projects completed		Complete	2 projects	F.1.8 Coordinate two LEAN Projects	Director OIRP/OQI	✓
	F.2: Manage risks that affect the university.	Yes or no assessment as to whether satisfactory annual risk assessment has been completed.	Yes	Yes	Yes	F.2.1 Complete annual university risk assessment.	Directors	✓

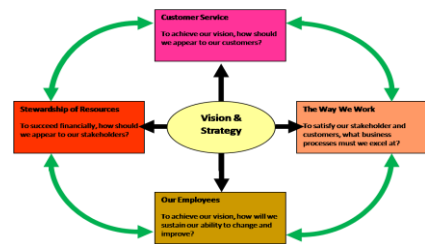
Legend: ✓ = Completed, IP = In Progress and On Time, D = In Progress and Delayed, X = Not Completed, C = Cancelled



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Quadrant	Objective	Measure	Long Term Target	09/10 Results	09/10 Target	Initiatives	Accountability	Status
				Complete	Complete	F.2.2 Conduct a review of the new Process for Ongoing Planning and make adjustments accordingly.	VP (F&A)	✓
		Review completed and changes, if any, made to the quadrant objectives.		Cancelled	Complete	F.2.3 Complete a review of F&A Divisional Balanced Scorecard quadrant objectives.	VP (F&A)	C
		Completed plans	Yes	Yes	Yes	F.2.4 Complete departmental emergency response plans.	Directors	✓
The Way We Work	I.1 Continuously improve our processes and services in an efficient and effective manner.	# of Benchmarking recommendations implemented.	100% Implementation	2 projects completed, 1 at 56% and 1 at 16% complete	3 projects completed and 1 at 30% implementation	I.1.1 Benchmarking Projects to be completed: Custodial Services, Residence Maintenance and Operations, Textbook Adoption, and implementation of Email and Network Storage project.	AVP (FMP), AVP (University Services), Director, Housing and Conference Services	✓
	I.2: Utilize effective strategic and operation planning.	% of approved operational initiatives that are achieved.	100%	78%	90%	I.2.1 Monitor progress mid-year point.	Directors	✓
		Introduce a new Planning Process for ongoing Planning for the university.	Fully implemented	Fully Implemented	100% dept. implementation	I.2.2 Each F&A dept. to develop their own plan for 2009-2010.	Directors	✓
				Complete	Complete	I.2.3 Communicate how F&A initiatives have improved service (e.g., reporting of the plan on an annual basis to staff).	Directors	✓
	I.3: Communicate quality, timely, and accurate information in division.	Overall rating on the statement "I am well-informed about decisions taken at a higher level".	2.5	Survey not implemented	2.8		Directors	C
Our Employees	L.1: Ensure a positive work environment.	Average number of sick hours/days/per year per eligible employee (within Division).	6.6 days	10.57 days	7 to 8 days	L.1.1 Each Director to develop a plan to meet targets.	Directors	✓
		Annual divisional full-time continuous staff turnover rate.	Voluntary: 4 to 6%	5.87%	Voluntary: 6 to 7%	L.1.2 Each Director to develop a plan to meet targets.	Directors	✓
		Annual Leave carryover for full-time continuous staff will have a maximum carryover of 30 days.	30 days	73%	75%	L.1.3 Each Director to develop a plan to meet targets.	Directors	✓
		% of departments with Recognition Programs	100%	In progress	90%	L.1.4 Each F & A department to develop their own Recognition Program.	Directors	IP

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**Finance and Administration Division**  
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**Strategic Measures and Initiatives – 2009-2010**

Quadrant	Objective	Measure	Long Term Target	09/10 Results	09/10 Target	Initiatives	Accountability	Status
	L.2: Support a Healthy and Safe Workplace.	WSIB # of lost days (160previousyear) WSIB # of claims (49 previous year)	TBD	152.5 days 39 claims	5% reduction	L.2.1 Physical Plant to develop a plan to reduce # of claims and days lost	AVP (FMP)	✓
		Establishment of a Health Workplace Committee.	YES	YES	YES	L.2.2 Implement the recommendations from the Wellness and Recognition Benchmarking Project.	VP (F&A), Director, Human Resources	✓

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