

**Finance and Administration Division**  
**Strategic Planning**  
**Strategic Measures and Initiatives – 2013-2014**

*Vision: Working Collaboratively, embracing new technologies and innovative ways of operation, we will provide best-in-class service to the Carleton Community.*

Quadrant	Objective	Measure	Long Term Target	13/14 Target	13/14 Results	Initiatives	Accountability	Status
Our Customers	C.1: Provide quality, responsive, and helpful services.					1. Continue to support Service Excellence. Services Excellence Standards measurement of success is tracked and there is ongoing training and support. (C.1, C.2, C.3, C.4)	F&A Leaders	
	C.2: Understand customer needs and anticipate future requirements.					2. Continue to assess Customer Satisfaction. Respond to online survey results with action plan to enhance the level of service when the score is less than 7.5. (C.1, C.2, C.4)	F&A Leaders	
	C.3: Foster a culture of Service Excellence.	Student customer satisfaction rating (C.1, C.2, C.3, C.4)	All services at 8 or above	7.5 or % of improved scores		3. 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, regular consultation with Deans and Directors and other information sources. (C.1, C.2, C.3, C.4)	F&A Leaders	
		Employee customer satisfaction rating (C.1, C.2, C.3, C.4)	All services at 8 or above	7.5 or % of improved scores				
	C.4: Provide a safe and respectful campus.					4. There is a quarterly review process to ensure their websites are communicating current information and social media opportunities are considered. (C.1, C.2, C.3, C.4)	F&A Leaders	
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		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. (F.1)	F&A Leaders	
		Successful delivery of Capital Programs.	% delivered on time and on budget	90% delivered on time and on budget		2. Capital Program - additions (MacOdrum, Herzberg, Alumni Hall, Steacie and Parking Facility) (F.1)	AVP (FMP)	
	F.2: Manage risks that affect the university.			Complete Phase Two		3. Explore development of North Campus (18 acres). (F.1)	VP (F&A) AVP (FMP)	
		Campus Energy consumption		Reduce by 2%		4. Enhance operational sustainability activities. (F.1)	AVP (FMP)	
				Solutions explored		5. Explore solutions to pension funding. (F.2)	VP (F&A)	

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

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				Complete Phase Two		6.Implement Phase Two: Emergency Management and Business Continuity Framework project. (F.2)	Director, University Safety	
The Way We Work	I.1 Utilize effective strategic and operational planning in support of the academic, research and administrative enterprise.	All depts./units have utilized the Strategic Planning Model.		100%		1. Each dept/unit to engage their employees in planning by utilizing the Strategic Planning Model and communicating results throughout the year. (I.1)	F&A Leaders	
				Complete		2. Each dept/unit to communicate how F&A initiatives have improved service (e.g. reporting of the plan on an annual basis to employees). (I.1)	F&A Leaders	
				Complete		3. Host two Coffee Hours for F&A staff to provide progress on plan. (I.1)	F&A Leaders	
				Complete		4. Develop HR Strategic Plan. (I.1, I.2)	AVP (HR)	
				Complete		5. Implement IT Strategic Plan. (I.1, I.2)	CIO	
				Complete		6. Develop EH&S Strategic Plan. (I.1, I.2)	AVP (FMP)	
	I.2: Work collaboratively.			6 projects		7. Support improvement projects, Benchmarking and Lean. (I.2, I.3)	Director, Quality Initiatives	
	I.3: Continuously improve our processes and services in an efficient and effective manner.			Complete		8. IT Program - Complete transition from WebCT to cuLearn, move email services to the Cloud, introduce BYOT solution for e-classrooms and student labs. (I.3)	CIO	
				Methodology developed - 2 pilots initiated.		9. Develop Process Management methodology and pilot in several departments. (I.3)	Director, Quality Initiatives	
				Bronze level certification		10. Submit application for Excellence, Innovation and Wellness Bronze level certification. (I.3)	F&A Leaders	

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<b>Our Employees</b>	L.1: Provide a collaborative healthy and respectful work environment.			Training complete		1. Evolve the HWP initiative by providing management with training raising the awareness and responsibility of a HWP. Encourage participation.	AVP (University Services) and F&A Leaders	
		Increase in Carleton Satisfaction Survey responses		HWP culture		2. Management to promote and encourage a safe, healthy, respectful, and supportive work environment in their day to day operations. (L.1)	F&A Leaders	
				HWP Level Two certification		3. Submit application for Level Two certification Healthy Workplace. (L.1)	AVP (University Services) and F&A Leaders	
	L.2: Encourage personal development through a focus on continuous learning and work experiences.	# of staff members participating in training and level of satisfaction in training programs.		Learning programs developed		4. Develop and implement learning programs that meet the needs of employees and support the Carleton Leader. (L.3, L.4)	Director, Quality Initiatives	
	L.3: Recognize performance and provide feedback.			Employees feel recognized for the good work they do		5. Each dept/unit to take the opportunity to recognize their employees formally/informally and engage staff in continuously improving their work. (L.3)	F&A Leaders	
	L.4 Develop Integrated Leadership Program.	Leadership Development Program Implemented (administrative)		Senior Leaders information session and 2 cohorts launched.		6. Launch Carleton Leader (L.4)	Director, Quality Initiatives	

***Mission: We contribute to Carleton's academic mission of teaching, research, and community service by providing professional services that are effective, efficient, and timely.***

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