



Carleton
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Canada's Capital University

Finance and Administration Coffee Hour

June 4, 2014

- Mission, Vision, Values and new Tagline
- Excellence, Innovation, and Wellness
- Accomplishments
- Key Initiatives for 2014 - 2015
- Take Duncan to Work
- Questions / Discussion

Our Vision

Working collaboratively, embracing new technologies and innovative ways of operating, we will provide best-in-class service to the Carleton Community.

Our Mission

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





Service Excellence

We meet customer needs through professional, responsive, reliable, and courteous service



Inclusive Decision Making

We collaborate in making evidence-based, timely and effective decisions.



Safe, Healthy, and Sustainable Environment

We foster a positive work environment.

Continuous Improvement
We challenge the status quo with innovative work processes and practices.



Employee Engagement
We value, respect, recognize, and support our employees.



Accountability
We are accountable for what we do and how we do it.



People focused. Excellence driven.
Dedicated to Excellence
Delivering Excellence
Innovation. Collaboration. Excellence.

Or...We don't need a tagline.



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**Accomplishments in
2013 - 2014**

Our Customers

- Held workshops with leaders from each department to identify and segment customer groups based on needs and values.
- Collected customer feedback in various ways: Carleton Satisfaction Surveys, mystery shoppers, focus groups evaluation forms.
- The university launched a new Social Media Strategy and training is in development.
- 60 F&A staff were nominated for a 2013 Service Excellence Award

Stewardship of Resources

- Completed six Capital Programs.
- Implemented Energy Services program in Robertson Hall as well as an Energy Service Renewal program in Athletics.
- Drafted Carleton's first Energy Master Plan.
- Developed Payment Card Industry (PCI) compliance procedures, training and consultations along with a security incident response plan.

The Way We Work

- Developed the IT Strategic Plan.
- Launched Ideas @Carleton through SoapBox.
- Completed three benchmarking projects.
- Placed a greater focus on strategic communication within the division.

Our Employees

- Launched Carleton Leader.
- Launched Supervisory Development Series.
- Submitted Healthy Workplace Level 2 application to Excellence Canada.
- Developed new training program on Preventing Workplace Violence and Harassment.

Achieved Bronze Level of the
Excellence, Innovation & Wellness
Standard

Congratulations to all!





Your Excellence, Innovation and Wellness Working Group

- Brian Billings - Safety
- Colleen Boucher - HR
- Fran Craig - Athletics
- Nancy Delcellier - EH&S
- Valerie Evans - Business Office
- Sue Gilmour – OIRP
- Scott Gonsalves - CCS
- Ed Kane - University Services
- Mary Kathryn Roberts - OVPFA
- Steve Sweeney - CCS
- Cindy Taylor - Quality Initiatives



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Key Initiatives for 2014 - 2015

Increase focus on the Voice of the Customer (VOC).

- Deepen our understanding of the needs and values of our customers.

Renew and refresh departmental Service Excellence Standards.

- Ensure that we are meeting customer needs on a daily basis.

Did you know?

Understanding customer needs and requirements is the strongest driver of overall customer satisfaction, according to analysis of the Carleton Satisfaction Survey.

(source: OIRP)



Document and manage key departmental processes using consistent methodology and tools.

- Partnering with Excellence Canada to deliver process management training (methodology).
- Recommendations on tools will be coming in 2014-15.

Did you know?

Process documentation and management are among key criteria for our Excellence, Innovation and Wellness Silver Level certification.

- University-wide perspective
- Federated IT environment
- Not a technology shopping list
- Three themes

carleton.ca/itstrategy

Carleton's IT strategy is made up of three themes

- **Improving Governance**
Enhance the role of the Computing Committees
- **Simplifying access to Services**
Create our first-ever, University-wide IT Service Catalog, which will list all the IT services offered at Carleton, regardless of the provider.
- **Understanding our IT spend**
Ensure IT spend is aligned with IT priorities



New Health Science Building



Coming Fall 2015: A University-wide eProcurement solution

For the University, a **SMART** solution:

- Improve operational efficiencies and workflows.
- Better understand university spend.

From a shopper's, a **FAST** and **EASY** solution:

- Shop from anywhere.
- Track purchase orders.
- Receive orders quickly.

This is a big project involving many people. So far the team has....

- Visited other universities that have implemented the SciQuest solution
- Held a kick off meeting with stakeholders from across the university
- Completed Process Mapping training with Excellence Canada

Next steps:

- Map the purchasing process
- Gather requirements
- Communicate to campus

...and we need a name! Have an ideas? Submit it at

carleton.ca/purchasing

“Duncan’s visit was a moral boost and helped reinforce the big picture.”
– Business Office

“Duncan’s short time with us was positive and motivating. It is encouraging that senior management is showing a truly vested interest.”
– CCS Ancillary Services

“Duncan asked a lot of good questions and I think he left with a better understanding of the level of detail and knowledge required to administer each of the approximately 2,500 research funds, which roll up to the one number that he sees on the financial statement.”
– Research Accounting

Sign up at carleton.ca/finance-admin



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Questions?