

**Finance and Administration Division
Strategic Planning
Strategic Measures and Initiatives – 2014-2015**

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	14/15 Target	14/15 Results	Initiatives	Accountability	Status	
Our Customers	C.1: Provide quality, responsive and helpful service.	Employee and customer satisfaction rating	All services at 8 or above	7.5 or % of improved scores		C.1.1. Share and discuss with dept./unit feedback received from the customer groups.	F&A Leaders		
						C.1.2. Revisit Service Excellence standards and their impact.	F&A Leaders		
						C.1.3. There is a yearly review process to ensure websites are communicating current information and social media opportunities are considered.	F&A Leaders		
	C.2: Foster a culture of service excellence.	Each dept./unit has a clear understanding of the needs and values of their key customer groups.	Identification of how to capture Voice of the Customer.		Complete		C.2.1. Focus on the Voice of the Customer: a) Understand the needs and values of Key Customer Groups.	F&A Leaders	
							b) Establish means to capture Voice of the Customer.	F&A Leaders	
							c) Determine Key Metrics.	F&A Leaders	
							C.2.2. Communicate Service Excellence standards externally/internally.	F&A Leaders	
	C.3: Provide a safe and respectful campus community.	Increase participation and awareness of initiatives.		Complete		C.2.3. Promote awareness and participation in initiatives i.e. Environment Health & Safety, Healthy Workplace, Mental Health.	F&A Leaders		

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

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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		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.	F&A Leaders	
		New Models investigated.		Complete		F.1.2. Investigate new models for resource allocation.	AVP's Financial Services and OIRP	
		Investigation complete.		Investigation complete		F.1.3. Investigate new sources of external revenue.	F&A Leaders	
	F.2: Manage risks that affect the university.	Key Risk indicators developed.		Key Risk indicators developed		F.2.1. Develop Key Risk indicators.	AVP Financial Services	
		Increase in participation.				F.2.2. Expand Risk Management Training.	AVP Financial Services	
	F.3: Formalize supplier and partner management.	SciQuest implemented.		SciQuest implemented		F.3.1. Implement SciQuest.	AVP's University Services & Financial Services	
	F.4: Promote university sustainability.			Operational sustainable initiatives implemented		F.4.1. Lead operational sustainability initiatives.	AVP FMP and all F&A Leaders	
		Linkages identified.		Complete		F.4.2. Explore sustainability linkages to research and academic programs.	VP F&A	
		Public awareness campaign successfully completed.		Public awareness campaign successfully completed		F.4.3. Public awareness campaign about existing initiatives and what individuals can do to promote sustainability.	AVP FMP, Manager, Strategic Communications	

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The Way We Work	I.1: Deliver a consistent methodology to document key processes and procedures.	Methodology selected.		Complete		I.1.1. Select methodology and tools to document key processes.	Director, OQI - Lead, AVP (University Services), CIO and Excellence Working Group	
		Pilot Project implemented.		Complete		I.1.2. Pilot methodology and tools to document key processes.	Director, OQI - Lead, AVP (University Services), CIO and Excellence Working Group	
The Way We Work	I.2: Utilize effective strategic, operational and governance planning to support the SIP.	Monitoring results.		SIP results being tracked		I.2.1. Monitor our contribution in supporting the SIP.	F&A Leaders	
		Silver Level certification readiness.	Platinum Level Certification.	Silver level readiness		I.2.2. Work towards achieving Excellence, Innovation and Wellness Silver level certification.	F&A Leaders	
		Communication of F&A success has been completed at every level of the division.		Complete		I.2.3. Communicate results through the year.	F&A Leaders	
	I.3: Create an accountability framework at the divisional level.	Framework selected.		Complete		I.3.1. Select a framework that will allow F&A to assess progress on KPI's deemed critical at the divisional level.	VP F&A	
		Divisional KPI's identified.		Complete		I.3.2. Determine divisional KPI's.	VP F&A	
		Communication of KPI's has been completed at every level of the division.		Complete		I.3.3. Communicate results throughout the year.	VP F&A, Manager, Strategic Communications	
I.4: Continuously improve our processes and services in an efficient and effective manner.	Project Methodology developed.		Complete		I.4.1. Develop Project Management methodology and pilot in several departments.	CIO - Lead, AVP's Financial Services, FMP, Director OQI & Excellence Working Group		
	Number of projects implemented.		6 Projects		I.4.2. Conduct continuous improvement projects (Benchmarking, Lean, Process Review).	Director, OQI		

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Our Employees	L.1: Provide a healthy workplace and supportive environment.	Evaluation of health promotions.		Meeting the needs of staff and faculty		L.1.1. Provide Health Promotion workshops/information sessions/resource areas that further engage our employees.	AVP (University Services), Director, OQI,	
		Increase in participation.				L.1.1. a) Provide flexibility for staff to participating in Health Promotion.	F&A Leaders	
		There is an increased awareness of work-life balance options.				L.1.2. Enhance work-life balance by raising awareness of available options.	AVP Human Resources	
		Successfully implemented Healthy Workplace Plan.		Actions completed - year one		L.1.3. Implement Healthy Workplace Plan - Year One.	F&A Leaders	
	L.2: Build an engaged workforce.					L.2.1. Develop a Talent Management System. a) Improve the organization's performance management capabilities.	AVP Human Resources	
		Implement LAPD strategy and Evaluation of programs.		Overall score 4 out of 5		b) Enhance Learning & Professional Development (LAPD).	Director, OQI	
		Staff feel they have opportunities for Professional Development.		Results of employee survey		c) Encourage staff participation in Learning & Professional Development.	F&A Leaders	
		Completion of CL streams and evaluation of effectiveness.		CL 3 cohort, CL 2 cohort , 4- CL 1 cohorts		d) Implement Carleton Leader cohorts	Director, OQI	
		Increase nominations				e) Promote participation in Carleton Leader.	F&A Leaders	
						f) Succession Planning.	AVP Human Resources	

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