

Our Customers							
Objective	Measure	Long Term Target	16/17 Target	16/17 Results	Initiatives	Accountability	Status
C.1: Provide quality, responsive and helpful service.	Employee and customer satisfaction rating.	All services at 8.5 or above.		8 or % of improved scores.	C.1.1. Share and discuss with dept./unit feedback received from employee and customer groups.	F&A Leaders	
					C.1.2. Review Service Excellence standards and their impact with faculty/staff and customers.	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.	Services and Product offerings are meeting the needs of our customers.	Complete		C.2.1. Focus on the Voice of the Customer: a) Gather information to understand the needs and values of Key Customer Groups. b) Make changes to services based on customer needs.	F&A Leaders	
	Number of depts. that conduct focus groups.	Each dept. conduct regular focus groups throughout the year.	Two depts. complete focus groups.		C.2.2. OQI to conduct focus groups with customers for two F&A Departments on level of service.	F&A Leaders	
	Each dept./unit to externally/internally communicate Service Excellence Standards.	Customers are aware of standards.	Complete		C.2.3. 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.3.1. Promote awareness and participation in initiatives i.e. Environment Health & Safety, Healthy Workplace, Mental Health.	F&A Leaders	

Stewardship of Resources

Objective	Measure	Long Term Target	16/17Target	16/17 Results	Initiatives	Accountability	Status
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/department.	F&A Leaders	
	Renewal requirements are prioritized and addressed to support the primary goals of the University.	The overall condition of the facilities improves from Poor to Good.	Annual capital renewal program completed.		F.1.2. Effectively manage Campus Renewal Program.	AVP FMP/VP F&A	
F.2:Manage risks that affect the university.	Financial Services Annual Plan	Complete	Complete		F.2.1. Explore and recommend Employment Liability Insurance.	AVP Financial Services	
	Annual Assessment complete.	Complete	Complete		F.2.2. Develop Key Risk Indicators - Determine measures for top 5 risks.	AVP Financial Services	
	Number of completed Business Continuity Plans.	All departments have a Business Continuity Plan that is reviewed regularly.	100% complete by summer 2016.		F.2.3. Develop a Business Continuity Plan for each dept./unit.	F&A Leaders	
F.4: Promote university sustainability.	Energy use reduction normalized for variable weather conditions and amount of campus space.	Reduce energy use by 20% from the base year 2012. Achieved to date 7%.	Reduce energy use by 2%.		F.4.1. Lead operational sustainability initiatives. - Monitor energy and water consumption.	AVP FMP and all F&A Leaders	

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The Way We Work

Objective	Measure	Long Term Target	16/17 Target	16/17 Results	Initiatives	Accountability	Status
I.1: Deliver a consistent methodology to document key processes and procedures.	Wide-spread implementation	100% of departments have key processes documented.	4 depts. document key processes.		I.1.1. Each department has documented their key processes.	Director, OQI - Lead, AVP (University Services), CIO and Excellence Working Group	
I.2: Utilize effective strategic, operational and governance planning to support the SIP.	Monitoring results.		SIP results being tracked.		I.2.1. Implement relevant, strategic initiatives that support the SIP.	F&A Leaders	
	Platinum Certification.	Platinum Level Certification achieved.	Gold level application submitted.		I.2.2. Apply for Excellence, Innovation and Wellness Gold level certification.	F&A Leaders	
	Each department has a planning process.	100%	80%		I.2.3. Each department to have a consistent Planning Process established that supports the University-Wide Planning Cycle.	F&A Leaders	
	Communication of F&A success has been completed at every level of the division.		Complete		I.2.4. Communicate results through the year.	F&A Leaders	
I.3: Create an accountability framework at the divisional level.	Success of KPI's for each department.		KPIs are established for each dept.		I.3.1. Determine department KPI's.	F&A Leaders	
	Communication Strategy developed and implemented.	Employee Engagement Survey results improved.	Action Focus Groups to determine increase in satisfaction.		I.3.2. A Communication Strategy to be developed and implemented for the F&A Division.	F&A Leaders, Manager Strategic Communications	
	Communication Strategy developed and implemented.	Employee Engagement Survey results improved.			I.3.3. Each department to develop and implement a Communication Strategy.	F&A Leaders, Manager Strategic Communications	
I.4: Continuously improve our processes and services in an efficient and effective manner.	Wide spread implementation of Project Management Methodology.		# of areas that have adopted project methodology.		I.4.1. Formalize and roll out Project Management methodology where appropriate.	CIO - Lead, AVP's Financial Services, FMP, Director OQI & Excellence Working Group	
	Number of projects implemented.		8 Projects		I.4.2. Conduct continuous improvement projects (Benchmarking, Lean, Process Review).	Director, OQI	
	Knowledge Plan developed.	Implementation of Knowledge Plan.	Plan Developed.		I.4.3. Develop a knowledge plan to share ideas, learnings and innovations with all F&A staff.	Director, OQI and all F&A Leaders	

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Our Employees

Objective	Measure	Long Term Target	16/17 Target	16 /17 Results	Initiatives	Accountability	Status
L.1: Provide a healthy workplace and supportive environment.	Evaluation of health promotions.		Meeting the needs of faculty and staff.		L.1.1. Provide Health Promotion workshops/information sessions/resource areas that further engage our employees.	AVP (University Services), Director, OQI,	
	Increase in participation.		Increase participation over previous year.		L.1.1. a) Provide flexibility for staff to participating in Health Promotions including management.	F&A Leaders	
	Successfully implemented Healthy Workplace Plan.		Actions completed - year Three.		L.1.2. Implement Healthy Workplace Plan - Year Three.	F&A Leaders	
	Mental Health Strategy implemented.		Actions completed - Year Two		L.1.3. Implement Mental Health Strategy - Year Two.	AVP (University Services)/Director, OQI.	
	Receive the Canada Awards for Excellence - Healthy Workplace.	Platinum Level Certification	Platinum Level application completed.		L.1.4. Apply for Healthy Workplace Platinum Level certification.	F&A Leaders	
	Receive the Canada Awards for Excellence - Mental Health.	Platinum Level Certification achieved.	Silver Level application submitted.		L.1.5. Apply for Mental Health at Work Silver Level certification.	F&A Leaders	
	Strategic Plan Developed.	Platinum Level Certification Achieved for Healthy Workplace and Mental Health at Work.	Strategic Plan developed.		L.1.6. Develop an Integrated Healthy Workplace Strategic Plan for 2017-2019.	HWP Committee	
	Awareness and supportive Mental Health Culture.		# of participants attending training		L.1.7. Encourage all staff to attend Mental Health training.	F&A Leaders	
L.2: Build an engaged workforce.	Full adoption of new performance development process.		100% of cycle completed with new online performance development system.		L.2.1. Implement new online professional development process (Admin Man and Admin Tech) for the 2016-2017 year.	AVP Human Resources	
	Human Resource Plan implemented.		HR Plan developed.		L.2.2. Develop and implement Human Resource Plan.	AVP Human Resources	
	Complete research on best practices.	Implementation of Pay for Performance.	Recommend Framework to move forward.		L.2.3. Explore best practices for implementing Pay for Performance.	AVP Human Resources	

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	HR Policies are actively being refreshed and approved for re-posting.	All policies fully scrubbed and posted. Governance framework in place to ensure they stay current.	80% of policies that have material changes to be approved by SMC.		L.2.4. Formalize HR Policies and have approved by SMC.	AVP Human Resources	
	Implement LAPD strategy and Evaluation of programs.	Integrated with performance management/ CD cycle.	Overall score 4 out of 5		L.2.5. Enhance Learning & Professional Development (LAPD).	Director, OQI	
	Staff feel they have opportunities for Professional Development.	Integrated with performance management/ CD cycle.	Results of employee survey.		L.2.6. Encourage staff participation in Learning & Professional Development.	F&A Leaders	
	Management Development Series Formalized.	Management Series Developed.	80%		L.2.7. Formalize Management Development Series.	Director, OQI	
	How many Managers participate in Fierce Conversations.	100%	80%		L.2.8. All Managers to participate in Fierce Conversations and Feedback.	F&A Leaders	
	Positive feedback received from participants attending Fierce Club gatherings.	100% satisfied	70%		L.2.9. Introduce Fierce Club a social learning forum for further practice and development of the Fierce Principles and Skills.	F&A Leaders	
	Completion of CL streams and evaluation of effectiveness.		CL 3 cohort, 2- CL 2 cohort, 2- CL 1 cohorts, 7 CL Community Events		L.2.10. Implement Carleton Leader cohorts.	Director, OQI	
	Survey conducted every 3 years - Key issues integrated into strategic planning.	Action plans implemented.	Improvement in the areas identified in next survey.	Conduct focus groups to determine if there has been an improvement in areas identified.	L.2.11. Each department to review and identify areas to improve based on their Employee Engagement Survey results and develop an action plan.	F&A Leaders	

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

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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