

Our Customers							
Objective	Measure	Long Term Target	17/18 Target	17/18 Results	Initiatives	Accountability	Status
C.1: Provide quality and responsive service.	Employee and Customer satisfaction rating.	All services at 8.5 or above.	8 or % of improved scores.		C.1.1. Share, discuss and respond to feedback received from faculty/staff/customer groups.	F&A Leaders	
					C.1.2. Review Service Excellence standards annually and their impact with faculty/staff/customers.	F&A Leaders	
					C.1.3. 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	
					C.1.4. Determine service level KPI's. Track and monitor.	F&A Leaders	
C.2: Provide a safe, healthy and respectful campus community.	Increase participation and awareness of initiatives.		Increase participation by 15%.		C.2.1. Increase awareness and participation in initiatives i.e. Environment Health & Safety, Healthy Workplace, Mental Health.	F&A Leaders	
	Installation of an integration system. TRA of campus buildings for prioritization of card access.	All buildings surveyed and as many systems in DUS Comms. Monitored by a single platform.	TRA survey completed. 50% of systems on ISS. EHS audit completed.		C.2.2. Campus wide Security Audit/Threat Risk Analysis/EHS Audit.	Director University Safety and EHS	
		Mobile safety app/ENS/AMS system tabletop exercises conducted.	New EM hired. Enhancements to ENS.		C.2.3. Continue to engage the campus in emergency preparedness - continuity of operations.	Director University Safety	

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Stewardship of Resources

Objective	Measure	Long Term Target	17/18 Target	17/18 Results	Initiatives	Accountability	Status
F.1 :Continue to 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	
	Develop revenue/cost model for academic units		Develop model.		F.1.2. Develop and communicate comprehensive revenue/cost model for academic units	VP & AVP Financial Services and OIRP	
	Resource Allocation Process developed.		Resource Allocation Process developed.		F.1.3. Develop New Resource Allocation Process.	AVP Financial Services	
	Annual Budget Report redesigned.	Annual Budget Report that is effective to all stakeholders.	Draft Annual Budget Report.		F.1.4. Redesign Annual Budget Report.	VP & AVP Financial Services and Director OQI	
F.2:Manage risks that affect the university.			Perform annual risk and monitor actions.		F.2.1. Perform annual risk assessment/identify divisional risks and monitor actions.	AVP Financial Services	
F.3: Promote environmental sustainability at the university.	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 8%.	Reduce energy use by 2%.		F.3.1. Lead operational sustainability initiatives. - Monitor energy and water consumption and other resources.	AVP FMP and all F&A Leaders	

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The Way We Work

Objective	Measure	Long Term Target	17/18 Target	17/18 Results	Initiatives	Accountability	Status
I.1: Utilize effective strategic, operational and governance planning to support the SIP and F&A Initiatives.	Platinum Certification.	Platinum Level Certification achieved.	Gold level certification achieved.		I.1.1. Achieve Excellence, Innovation and Wellness Gold level certification.	F&A Leaders	
					I.1.2. Prepare for Excellence, Innovation and Wellness Platinum level certification.	F&A Leaders	
	Initiatives Complete		Complete		I.1.3. Implement relevant strategic initiatives (including SIP).	F&A Leaders	
	Each department has a planning process.	100%	80%		I.1.4. Each department to have a consistent and inclusive Planning Process established that supports the University-Wide Planning Cycle.	F&A Leaders	
I.2: Continuously improve our processes and services in an efficient and effective manner.	All key processes are documented throughout F&A.	100%	80%		I.2.1. Deliver a consistent methodology to document key processes and procedures.	F&A Leaders	
	Number of projects implemented.		8 Projects		I.2.2. Conduct continuous improvement projects (Benchmarking, Lean Process Review and large system projects e.g. Travel Expense).	Director, OQI & F&A Leaders	
	Streamline processes and demonstrate improvement.		Improved IT Support for research community.		I.2.3. Increase IT Support for research community. improved research computing services - OQI Lean Process Review and ITS automate were appropriate - centralized research software mgmt.	ITS	
	Learning Space Strategic Plan is developed.				I.2.4. Facilitate the development of a Learning Space Strategic Plan.	AVP, FMP	
	Opportunities explored		Complete		I.2.5. Explore the opportunities for F&A to enhance experiential (working integrated) learning.	F&A Leaders	
	# of projects				I.2.6. Expand engagement with research activities.	AVP, FMP	
	Continue to improve IT Security posture.		Network Segregation and Security Zoning architecture and Two-Factor Authentication complete.		I.2.7. Increase IT security posture to protect the university's IT systems and information - Network Segregation and Security Zoning architecture - Two-Factor Authentication for privileged accounts.	Director, University Safety	
	Installation of an integration system.	100%	80%		I.2.8. Convergence of Security Systems Integration.	Director, University Safety	

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	Perform a TRA to prioritize card access/CCTV installation for campus buildings.	100% all buildings surveyed.	75% of buildings surveyed and actioned.		I.2.9. Assess Perimeter Security.	Director, University Safety	
Our Employees							
Objective	Measure	Long Term Target	17/18 Target	17/18 Results	Initiatives	Accountability	Status
L.1: Provide a healthy, respectful workplace and supportive environment.	Receive the Canada Awards for Excellence - HWP Platinum Level Certification	Platinum Level Certification achieved.	Platinum Level certification achieved.		L.1.1. Achieve Healthy Workplace Platinum Level certification.	F&A Leaders	
	Receive the Canada Awards for Excellence - Mental Health- Platinum Level Certification	Platinum Level Certification achieved.	Silver Level certification achieved.		L.1.2. Achieve 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.1.3. Develop and implement Integrated Healthy Workplace Strategic Plan for 2017-19.	HWP Committee	
L.2: Build an engaged workforce.	Succession Readiness is in place for F&A.	Succession Plan in place across university.	F&A Division		L.2.1. Pilot Succession Planning within Finance and Administration division.	AVP HR and F&A Leaders	
	Implement Pilot.	Employees feel they are making a contribution	Overall evaluation 4 out of 5		L.2.2. Introduce Coaching at Carleton.	Director, OQI	
	Review of Carleton Leader completed.	60% of participants have taken on more of a leadership role.	60%		L.2.3. Carleton Leader 5th year Anniversary: Review impact and future development.	Director, OQI	
	Revise LAPD strategy and Evaluation of programs.	Integrated with performance management/ CD cycle.	Overall score 4.5 out of 5		L.2.4. Revise Learning & Professional Development (LAPD) Strategy.	Director, OQI	
	Benchmarking Review completed and recommendations implemented.	Conducted Benchmarking Project.	Recommendations Identified.		L.2.5. Review Recognition both formally and informally.	F&A Leaders	
L.3. Continue to build a positive collaborative work environment for all employees.	Completion of the PDP Process.		100%		L.3.1. Continue to enhance performance management effectiveness.	AVP HR and F&A Leaders	

Vision: Working collaboratively, embracing new technologies and innovative ways of operating, 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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