

Our Customers							
Objective	Measure	Long Term Target	18/19 Target	18/19 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. Build collaborative relationships with student support services to better identify and respond to their needs. Pilot working group.	F&A Leaders	
					C.1.4. Clearly articulate the impact customers feedback had on product/service level changes.	F&A Leaders	
					C.1.5. Track and monitor KPI's per department. Semi-annual and annual report to Admin Directors.	F&A Leaders	
C.2: Implement operating model at Carleton DC Centre	Successful operation of the Centre for the benefits of Carleton and the Community.	Meeting established KPI's.	Successful ownership transition.		C.2.1. Develop and implement transition plan, covering staffing, systems, budget, renovations, communication, etc..	AVP University Services and F&A Leaders	
C.3: Providing students and staff with appropriate facilities.	Long-range plan for new facilities and infrastructure.	Meeting the needs of key stakeholders.	Project designs for: FED facility, student residence.		C.3.1. Consultation with stakeholders, preparation of conceptual designs, presentation to Board (to include funding).	AVP FMP	
C.4: Provide a safe, healthy and respectful campus community.	Emergency Management Preparedness.	Build effective Emergency Management Office and ability to respond to critical incidents.	Training and awareness programs in place and updated BCP.		C.4.1. Maintain collaboration with depts., update BCP and perform table-top exercises.	Director, University Safety	

**Stewardship of Resources**

<b>Objective</b>	<b>Measure</b>	<b>Long Term Target</b>	<b>18/19 Target</b>	<b>18/19 Results</b>	<b>Initiatives</b>	<b>Accountability</b>	<b>Status</b>
F.1 : Provide effective stewardship of university resources.	Operating, Ancillaries, and Capital budgets achieved.	Multi-year financial plans in place.	Results on or below budget.		F.1.1. Monitor financial results on a regular basis and identify areas of concern.	F&A Leaders	
	Resources allocation model	New resources allocation model to ensure optimum allocations in academic and administrative units.	Develop new resources allocation options		F.1.2. Complete cost allocation study, identify areas of concerns, and propose alternate models.	VP & AVP Financial Services and OIRP	
	Management of SMA metrics.	Information on SMA metrics is readily available and part of decision making.	Development of regular report on SMA metrics.		F.1.3. Information on SMA metrics becomes part of ongoing management discussion.	VP & AVP OIRP	
	Annual Budget Report	Annual Budget Report that meets GFOA criteria.	Complete first draft of report for distribution.		F.1.4. Identify and accumulate elements of Budget report that meet GFOA criteria.	VP & AVP Financial Services and Director OQI	
F.2 Manage risks that affect the university.	IT Security - Access Controls	Multi Factor Authentication (MFA) in place for critical business applications.	Selected MFA solution piloted.		F.2.1. Improve Cyber Security Posture by Implementation of enhanced account authentication capabilities for faculty and staff.	AVP,ITS & CIO	
	Succession Planning Framework for F&A	Succession Planning Framework in place and pilot complete.	Planning framework developed and pilot completed.		F.2.2. Build Succession Planning Framework and complete pilot in F&A	AVP HR	
	Consultant's review and implementation of recommendations.	Updated model to reflect latest "best practices".	Complete assessment and implement recommendations.		F.2.3. Complete assessment of Enterprise Risk Assessment Model.	AVP Financial Services	
	Data to identify Students at Risk. (drop-out)	System to Identify students at risk and interventions required to improve retention / graduation rates.	Pilot to identify students at risk in Ba-like programs.		F.2.4. In partnership with OVPSE, Develop an early identification big data model of students a risk.	AVP OIRP	
F.3: Promote environmental sustainability at the university.	Energy and waste reductions	Reduce energy use by 20% from the base year 2012. Achieved to date 8%.	Reduce energy use by 2%.		F.3.1. Implementation of the Carleton Energy Master Plan.	AVP FMP	
	Campus traffic and parking study.	Efficient and safe traffic flow on campus	Completion of study		F.3.2. Consulting review and engagement of community stakeholders on campus traffic and parking study.	AVP FMP	

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

**The Way We Work**

Objective	Measure	Long Term Target	18/19 Target	18/19 Results	Initiatives	Accountability	Status
I.1: Utilize effective strategic, operational and governance planning to support Carleton SIP and F&A strategies	Excellence, Innovation, and Wellness (EIW) Certification.	Achieve Excellence Canada Platinum level	Platinum level readiness		I.1.1.Prepare for Excellence, Innovation and Wellness Platinum level certification.	F&A Leaders	
	Planning process exist in each F&A Dept.	Planning process everywhere	80% in place		I.1.2. Each department to have a consistent and inclusive Planning Process established that aligns with the Carleton Planning Framework.	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	
	Benchmarking review: Carleton internal charging mechanisms.	New policy on internal charges implemented.	Benchmark study completed and recommendations approved.		I.2.2. Internal Chargeback Benchmarking Project complete with recommendations approved and budgets realigned.	Director OQI and AVP Financial Services	
	Lean review: research support activities.	Improve research support and client satisfaction	Study completed and implementation plan approved.		I.2.3. Lean process review completed, recommendations approved and action plan developed.	Director OQI, AVP. ITS & CIO, AVP Financial Services	
	Strengthen construction Project Management capacity.	Highly effective Project Management Office.	New PM system, increased capacity, and use of "best practices".		I.2.4. Adoption of integrated project Management System, and implementation of consultant's recommendations.	AVP FMP	
	Expand IT support to researchers throughout the campus.	Increased value of research grants received and university ranking.	Additional staff support, research IT storage space, web-presence, consortia memberships, and infrastructure improvements.		I.2.5. New dedicated IT support staff, investments in technology and negotiated relationships with consortia (e.g. Compute Canada).	AVP,ITS & CIO	

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<b>Our Employees</b>							
<b>Objective</b>	<b>Measure</b>	<b>Long Term Target</b>	<b>18/19 Target</b>	<b>18/19 Results</b>	<b>Initiatives</b>	<b>Accountability</b>	<b>Status</b>
L.1: Provide a healthy, respectful workplace and supportive environment.	Develop and implement Healthy Workplace Strategic Plan for 2018-21.	Achieve and Maintain Canada Awards for Excellence - Platinum Level	Platinum Level certification achieved.		L.1.1. Work towards Healthy Workplace - Order of Excellence.	F&A Leaders	
	Develop and implement Mental Health at Work Strategic Plan for 2018-21.	Achieve and Maintain Canada Awards for Excellence - Platinum Level Certification.	Gold Level certification achieved.		L.1.2. Work towards Mental Health at Work GOLD Level certification.	F&A Leaders	
L.2.: Build an engaged and productive workforce.	Maintain competitive compensation and benefits program	Ability to recruit and retain high caliber employees.	Identify gaps and propose competitive compensation program.		L.2.1. Conduct salary and benefits survey for non-unionized staff.	AVP HR	
	Upgrade current job classification (HAY) system	New Job architecture, new job families and classification.	Propose new system and implementation plan.		L.2.2. Research new job classification system and prepare implementation plan.	AVP HR	
	Coaching at Carleton - Pilot	Employees feel they are making a contribution.	Overall evaluation 4 out of 5		L.2.3. Introduce phase 2 Coaching at Carleton - Skills Coaching.	Director, OQI	
	LAPD strategy and Evaluation of programs.	Integrate with performance management/ CD cycle.	Overall score 4.5 out of 5		L.2.4. Revise Learning & Professional Development (LAPD) Strategy. - e.g., skills development and upgrade.	Director, OQI	
	Promote Carleton Leader program externally.	The Carleton Leader is known internationally.	Deliver Carleton Leader to an external institution.		L.2.5. Carleton Leader offered externally.	Director, OQI	
L.3. Continue to build a positive collaborative work environment for all employees.	Carleton University Recognized as one of the Top 100 Employer's in Canada.	Achieve Top 100 Employer's recognition.	Develop plan to achieve recognition.		L.3.1. Work towards achieving Top 100 Employer in Canada.	AVP HR	

***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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