

# Finance and Administration Strategy

2023-2028

People Focused. Excellence Driven.

Carleton  
University





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# Introduction



Lorraine Dyke, Vice-President  
(Finance and Administration)

I am proud to present the Finance and Administration Strategic Plan 2023-2028.

Developing a strategic plan takes time and team effort. I would like to take this opportunity to thank the Office of Quality Initiatives for leading the consultation process with our staff, as well as our campus stakeholders. Over the course of six months, we connected (in person and online) with more than 200 people – both internal and external to the portfolio. Finance and Administration staff often spoke about the pride they take in their work, their dedication to service excellence and the importance of meeting the needs of the campus community. Our stakeholders expressed a desire to partner – working collaboratively with our departments to achieve successful outcomes together. They were also impressed with the breadth of the services and support we provide to the campus.

We are excited about the future. With this strategy as our guide over the next five years, we will continue to have a significant impact on our campus community in support of the academic mission and organizational excellence.

We are committed to the work ahead and to taking the journey with you.

I encourage you to engage with our strategic plan. Should you wish to share your thoughts, please email us at [financeadministration@carleton.ca](mailto:financeadministration@carleton.ca).

Sincerely,

Lorraine Dyke  
Vice-President (Finance and Administration)  
On behalf of the Finance and Administration Leadership Team

# Aspiration Statement

We aspire to co-create an environment where teaching, learning, research and community engagement thrive.

We take a solutions-focused approach in partnership with our stakeholders.

At the centre of our success are our people and our commitment to Environmental, Social and Governance (ESG) principles.

## Our Responsibilities

Finance and Administration units oversee Carleton University's physical, financial, technological and human resources. Our portfolio is comprised of eight departments that offer diverse services to our campus community in support of the academic mission and the university's goals.

### Campus Safety Services

supports personal safety, protection of property and parking services to meet the needs of the campus community and our visitors.

### Facilities Management and Planning

develops and maintains all building assets providing for the functionality, comfort, safety, sustainability and efficiency of the built environment.

### Financial Services

provides the university community with the tools and guidance necessary for management of their financial resources.

### Human Resources

provides integrated, innovative people-centred services that foster the recruitment, retention and development of an engaged, healthy and effective workforce.

### Information Technology Services

provides enterprise IT solutions and services to support the learning, teaching, research, and administrative goals of the university.

### Office of Quality Initiatives

provides leadership on continuous improvement initiatives that enable positive change and innovation.

### Office of Risk Management

provides a holistic approach to managing risk at the university.

### Pension Fund Management

provides effective management of the Carleton University Retirement Fund and endowment.





# Our Values

Our values reflect what we believe in. They are at the heart of how we approach our daily work and leadership.

## **Collaboration:**

We believe in working together to ensure planning and decisions are collaborative, timely and transparent.

## **Inclusion:**

We believe in a safe, healthy work culture where diversity and equity is valued.

## **Innovation:**

We believe that continuous improvement happens by challenging the status quo, resulting in learning and growth.

## **Service Excellence:**

We believe in meeting our stakeholders' needs through responsive, reliable and respectful service.

## **Sustainability:**

We believe in practices that ensure the sustainability of our resources for future generations.



# Our Commitments and Pathways Forward

In developing Finance and Administration's strategic plan, four common themes emerged through our consultations. These have been formalized as our commitments to the campus community. These align with our values, and are the common threads that connect us.

## People Focused.

### Partner with Stakeholders

#### Commitment: Partner with Stakeholders

Together with our stakeholders, we work collaboratively to support teaching, learning, research and community engagement at Carleton.

#### Pathways:

- Create forums for information exchange to enhance understanding and build trust.

We will offer forums related to various services, such as Human Resources, to share knowledge and build relationships with our campus partners. The goal is to gain a better mutual understanding of needs and resources. Through this collaboration, we will seek to establish and share leading practices to benefit the campus community.

- Provide resources to support integrated planning and the success of our stakeholders.

We will seek to engage with our stakeholders early in decision-making

processes to explore available options and co-ordinate efforts to ensure positive outcomes. This will help shift the conversation from “if/no” to “how” and build the shared objectives that characterize true partnership.

- Model transparency in our processes and decisions.

Providing clarity about how we work is paramount to establishing trusted relationships. We are dedicated to service excellence and we will strive to create a clear understanding of our processes and what we bring to the table.

- Create structured ways to invite and respond to feedback.

We welcome hearing from our stakeholders so that we can better understand and respond to their needs. We will create structured ways to receive, and respond to, feedback to enhance our continuous improvement efforts and collaboration.



### **Commitment: Enable Our People**

We value our people and we seek to create healthy work environments that enable everyone to thrive.

## **Enable Our People**

#### **Pathways:**

- Promote diversity, equity and inclusion (DEI), Indigenous initiatives and accessibility in our teams.

Building on the strong foundation of DEI, Indigenous initiatives and accessibility across the university, we will create welcoming and respectful spaces that instill a sense of belonging and allow people to thrive.

- Support mental health, well-being and work-life balance.

Carleton is a nationally recognized leader in mental health and wellness. We recognize the importance of supporting our colleagues. We will work to provide flexibility and support for our team members by understanding their needs and providing supports.

- Foster individual growth through experiential learning, and professional and leadership development opportunities.

Further education, on-the-job training, professional development opportunities, special projects and mentoring are all important opportunities for professional development. We will support professional development through impactful opportunities to grow and learn. Being the best that we can be supports our commitment to pursue excellence in the everyday.

- Champion a sense of community.

Our Carleton community shines especially brightly when we gather to celebrate one another and our accomplishments. We will continue to champion a sense of belonging in our community through activities that bring us together.



# Excellence Driven.

**Pursue Excellence in the Everyday**

## **Commitment: Pursue Excellence in the Everyday**

We pursue organizational and service excellence throughout our daily operations and strategic initiatives.

### **Pathways:**

- Model a solutions-focused approach in collaboration with our stakeholders.

We will work together with stakeholders to identify and implement creative solutions. Through collaboration, we will ensure that needs are well understood and effective solutions are identified.

- Promote a digital mindset by leveraging tools and technology.

We recognize that a digital mindset can support our commitment to excellence. We will use tools and technology to improve processes and open up space and time for innovation.

- Cultivate a culture of continuous learning and improvement that facilitates innovation and growth.

A continuous improvement mindset is core to our service delivery, providing valuable opportunities for learning, growth and innovation. We will model and support this growth mindset throughout our teams.

- Communicate and report on our service standards to promote accountability and improvement.

We will model accountability and transparency. Our teams will communicate our service standards and demonstrate openness to change in order to improve and to meet our goals.



### **Commitment: Embed Environmental, Social and Governance (ESG) Principles**

As responsible managers of the university's physical, technological, financial and human resources, we embed ESG considerations in our decision-making.

## **Embed Environmental, Social and Governance (ESG) Principles**

#### **Pathways:**

- **Environmental:** Pursue sustainability goals (environmental, financial and technological), including the effective use of physical spaces.

Carleton University is committed to becoming a carbon neutral campus by 2050. We will continue to identify actions to reduce our carbon footprint, track our progress and report back to our community. As the use of our campus spaces evolves, we will encourage responsible stewardship of our physical spaces.

- **Social:** Promote an inclusive culture through implementation of initiatives in the EDI Action Plan, Kinàmàgawin, the Coordinated Accessibility Strategy and the Healthy Workplace Strategy.

We will enact our commitments to diversity, equity and inclusion (DEI), to reconciliation as outlined in the Calls to Action developed by the Carleton University Strategic Indigenous Initiatives Committee, and to address accessibility needs throughout our operations. We will seek ways to continue to build respectful relationships through action.

- **Governance:** Review governance structures and implement policies to align with ESG leading practices.

To be trusted partners and deliver on our commitments, we will embrace principles of good governance. We will ensure that our decision-making processes reflect integrity, transparency and accountability.



# Follow Our Journey

The commitments we have embraced and the pathways we have identified will shape our planning process going forward. As part of that planning process, we will review our progress and provide annual updates to the campus community.

Our journey with our campus partners continues and the future promises to be exciting. We welcome your feedback along the way so that we can continuously improve and learn from each other. We welcome your ideas and innovative approaches to

our challenges. You can always reach us at [financeadministration@carleton.ca](mailto:financeadministration@carleton.ca) or visit [carleton.ca/finance-admin](http://carleton.ca/finance-admin)

# Appendix A: Supporting Strategic Plans

The Finance and Administration Strategic Plan is guided by, and aligns with, Carleton's Strategic Integrated Plan (SIP), as well as other strategies, including:

Academic Plan

Campus Master Plan

Coordinated Accessibility Strategy

Digital Strategy

EDI Action Plan

Energy Master Plan

Healthy Workplace Strategic Plan

Kinàmàgawin Report

Outdoor Space Master Plan

Sustainability Plan



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