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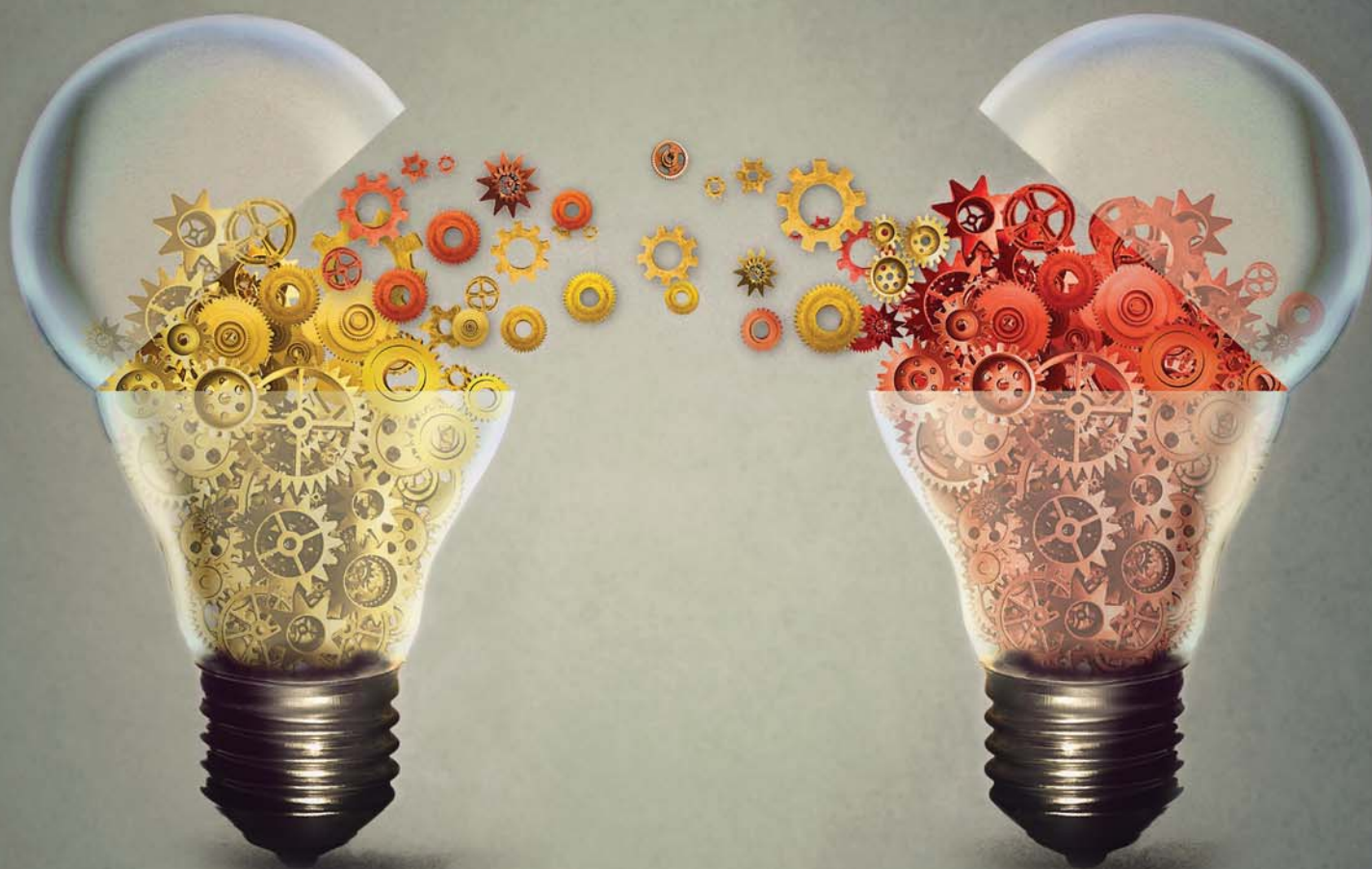
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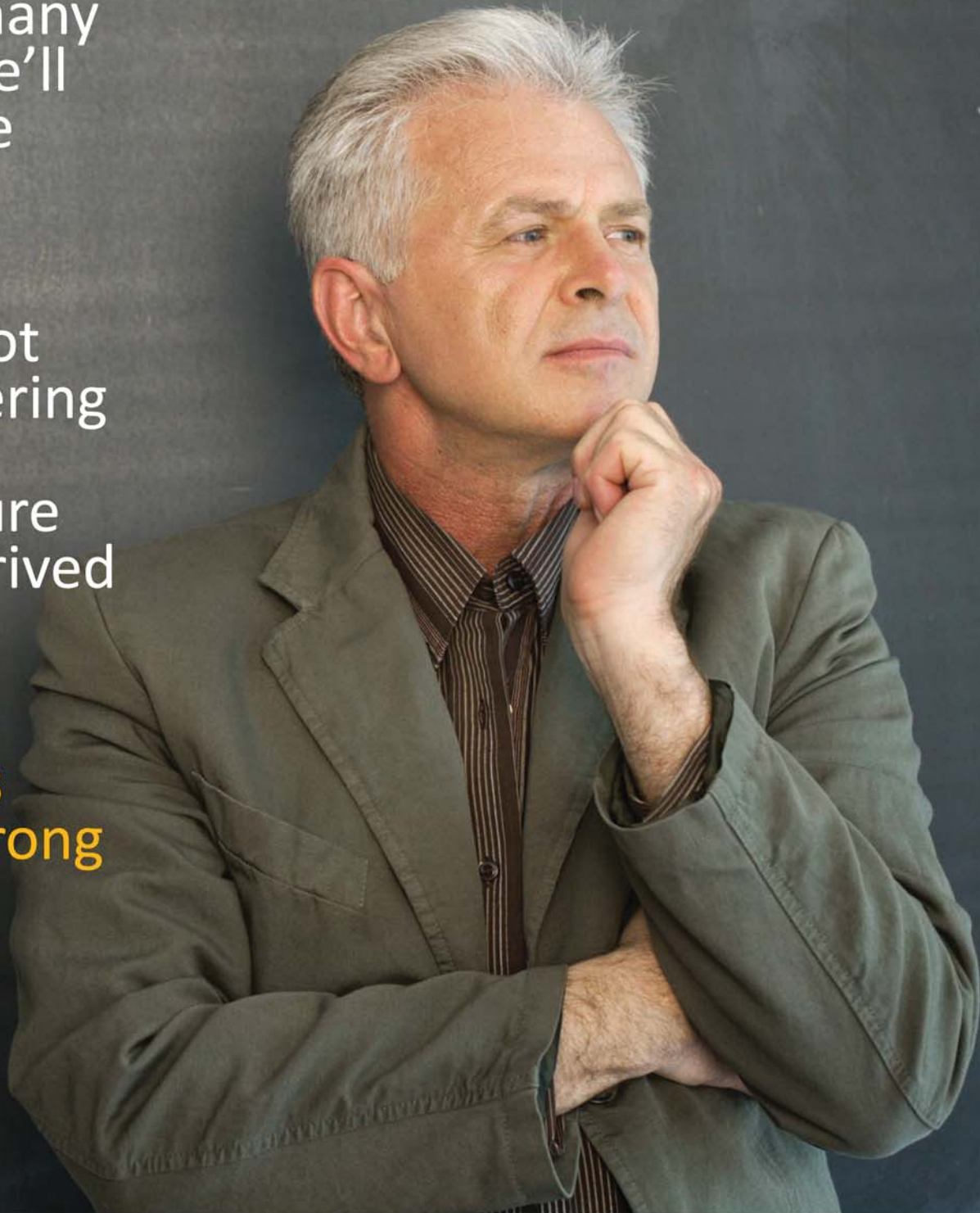
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Gestion universitaire *Manager*

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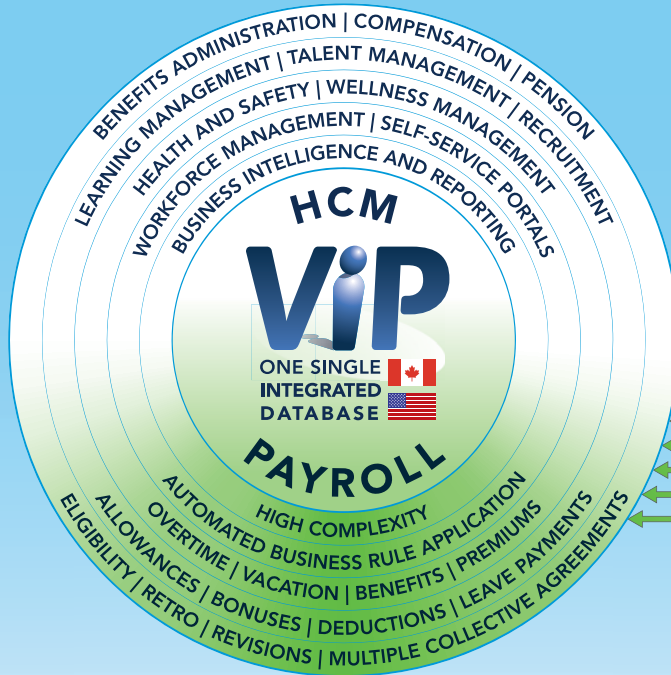
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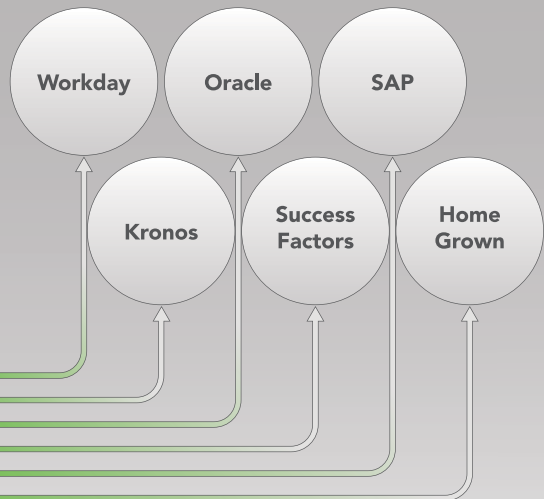
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A year in reflection

By Gayle Gorrell

Equipped with a strong strategic plan and the structure to put it into action, we started the year ready to go! The results were beyond our expectations.

One of the primary goals for the past year was to provide better data to our members to assist in their decision-making and we are making great progress. I am happy to announce that, in partnership with the Université du Québec, CAUBO will very soon be launching a new data reporting tool. We undertook an ancillary benchmarking survey that will provide data to ancillary leaders and senior executives in order to better understand how their operations compare to others and where they might be able improve.

Another goal was for CAUBO to continue providing resources on national issues of concern to universities. Last fall's divestment workshop was a great success, providing universities with valuable information and tools. The 2016 report *Cyber-Security in a University Setting*, was equally well received. This report, commissioned by CAUBO with support from CUCCIO, offers an excellent toolkit while raising awareness of this issue that has very quickly become a high risk for universities.

"The work on Divestment and Cyber-Security were wonderful examples of our ability to leverage the breadth of experience and expertise within our university community, while working with other organizations, associations, and councils."

The work on Divestment and Cyber-Security were wonderful examples of our ability to leverage the breadth of experience and expertise within our university community, while working with other organizations, associations, and councils. We have positioned ourselves well to collaborate with other organizations and increasingly, these groups are coming to us and expressing interest in what we do. We are seen as an organization that can help.

None of this would be possible without the outstanding support of volunteers across the sector. We have explored different ways of accessing their expertise and knowledge while being respectful of their time. They help us think strategically about what we need to do and how best to do it.

Serving as president has given me an even greater appreciation for the team within CAUBO as well as my colleagues across the country. I am very confident that with the guidance of CAUBO staff and the many volunteers, the Association will continue to increase the value it provides to its members.

As I transition to the role of past president, I hope to continue playing an active role, especially when it comes to transforming data into information, a project that is very important to me. One goal that I did not achieve was my ability to say more than two sentences "en français," although I did try! I know that CAUBO will be in very good hands with the new president, Éric Tufts, at the helm – and the fact that he is bilingual is a bonus.

Thank you for the opportunity to serve. 

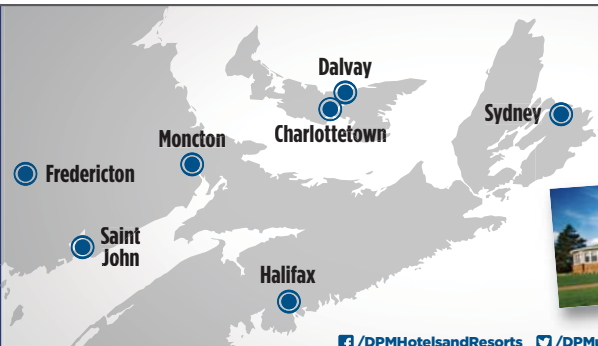
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Message de la présidente



Réflexion sur l'année écoulée

Par Gayle Gorrill

Avec un plan stratégique solide et les moyens de le mettre en œuvre, nous avons commencé l'année en force, et les résultats ont surpassé nos attentes.

L'an dernier, l'un de nos principaux objectifs était de fournir encore plus de données et d'informations à nos membres pour les aider dans leur prise de décisions. À ce chapitre, nous faisons de grands progrès. C'est avec plaisir que l'ACPAU lancera prochainement un nouvel outil de communication de données en partenariat avec l'Université du Québec. Nous avons mené un sondage sur les services auxiliaires qui fournira aux responsables de ces services et aux membres de la haute direction des données leur permettant de comparer leurs activités à ce qui se fait ailleurs et de déterminer ce qu'ils pourraient améliorer.

L'ACPAU souhaitait également poursuivre la prestation de ressources sur les questions nationales préoccupantes pour les universités. L'automne dernier, notre atelier sur le désinvestissement a récolté un franc succès. Les universités ont pu y obtenir de l'information et de précieux outils. Le rapport *La cybersécurité en contexte universitaire* de 2016 a également connu un accueil favorable. Ce rapport commandé par l'ACPAU, avec le concours du CDPIUC-CUCCIO, constitue un excellent coffre à outils pour accroître la sensibilisation à cette question qui est rapidement devenue un grand risque pour les universités.

Notre travail sur le désinvestissement et la cybersécurité sont d'excellents exemples de notre capacité à mettre à profit notre vaste expérience et notre expertise au sein de la communauté universitaire, tout en travaillant avec d'autres organismes, associations et conseils. Nous nous sommes bien positionnés pour collaborer avec d'autres organisations et, de plus en plus, ces groupes viennent à nous et manifestent leur intérêt pour ce que nous

<< L'an dernier, l'un de nos principaux objectifs était de fournir encore plus de données et d'informations à nos membres pour les aider dans leur prise de décisions. >>

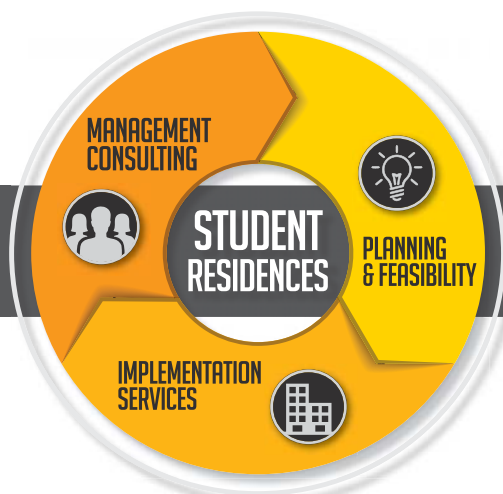
faisons. Nous sommes perçus comme un organisme en mesure d'aider.

Rien de tout cela ne serait possible sans le concours exceptionnel de nos bénévoles de tout le secteur. Nous avons exploré différentes avenues pour pouvoir profiter de leur savoir-faire et de leurs connaissances tout en respectant leur disponibilité. Ils nous aident à voir d'un œil stratégique ce que nous devons faire et à déterminer la meilleure façon de s'y prendre.

En tant que présidente, j'ai pu apprécier encore plus le travail de l'équipe de l'ACPAU et de mes collègues de partout au pays. Je ne doute aucunement qu'avec l'aide du personnel de l'ACPAU et des nombreux bénévoles, l'Association continuera d'accroître la valeur des services qu'elle offre à ses membres.

Je serai bientôt présidente sortante, mais j'espère continuer de jouer un rôle actif pendant ma transition, surtout en ce qui a trait à la transformation de données en information, car c'est un projet qui me tient beaucoup à cœur. Hélas, je n'ai pas atteint au cours de mon mandat mon objectif de réussir à prononcer plus de deux phrases en français, malgré tous mes efforts! Je sais que l'ACPAU sera entre bonnes mains avec son nouveau président, Éric Tufts, et le fait qu'il soit bilingue sera assurément un atout.

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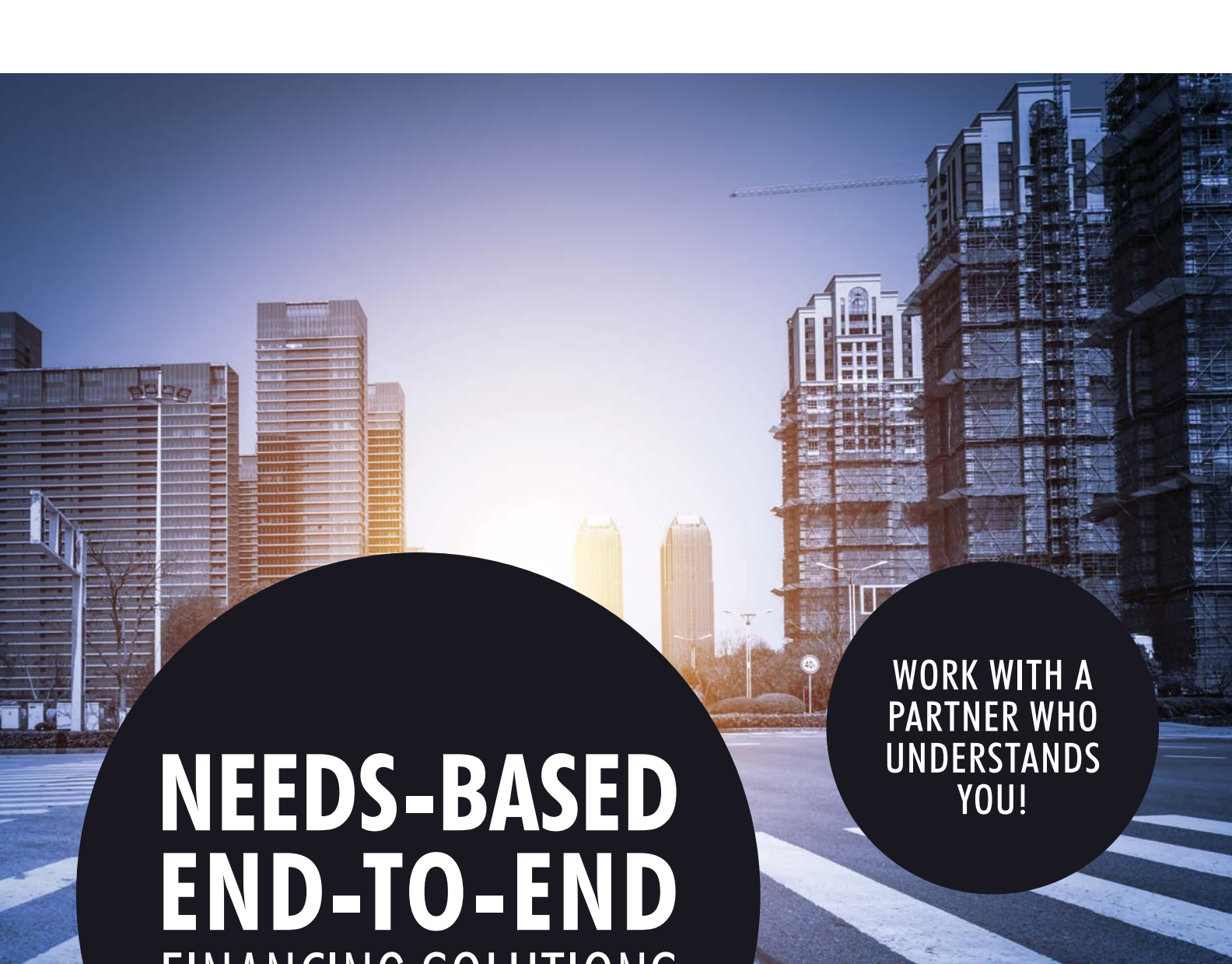


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Divestment:

Building a toolkit for an effective, ethical, and responsible approach

Divestment campaigns targeting the fossil fuel industry have become a prominent occurrence for Canadian higher education institutions in recent years, and it is anticipated that this trend will not end anytime soon. From November 24-26, 2016, CAUBO hosted a workshop in Toronto, Building a Toolkit for Effective, Ethical and Responsible Responses to Divestment Campaigns. This workshop was designed to help institutions respond to divestment requests in such a way as to ensure their fiduciary responsibilities, social objectives, and environmental concerns are duly considered, carefully balanced, and positively conveyed.

To date, most universities have been reactive in their approach to divestment campaigns. They have focused their efforts on developing strategies to respond to campaigns as they arise. A change in focus towards proactively adopting responsible investment policies allows universities to more effectively facilitate meaningful discussion and outcomes.

There are plenty of arguments to support this new approach. University administrators operate in an evolving investment context that is increasingly shifting towards responsible investment, integrating environmental, social and governance (ESG) factors. Trustee consideration of ESG factors, once “prohibited,” and then “permissible,” are now “required,” observed Kevin Thomas, Director of Shareholder Engagement at the Shareholder Association for Research & Education, and a guest speaker at November’s CAUBO workshop. This shift acknowledges the potential material impact of ESG factors on investments, including their effect on long-term sustainability, stability and risk management.”

Campaigns to divest of fossil fuels are the most common divestment campaigns in Canadian campuses in the last five years. Thomas argues, climate change in and of itself is expected to have a significant

material impact on portfolios due such risk factors as stranded assets and the potential for physical damage to holdings from changing weather patterns. It is increasingly common for legal advisers to equate ignoring climate risk with a breach of fiduciary responsibility.

However, divestment is not necessarily the answer. All presenters at the workshop emphasized that responsible investment policies are more effective than divestment in facilitating meaningful climate action and managing climate risk. In fact, because 20% of the Canadian economy is tied to the energy sector, fossil fuel divestment can be problematic, reported guest speaker Christie Stephenson, Executive Director for the Peter P. Dhillon Centre for Business Ethics at the University of British Columbia Sauder School of Business. It could also lead to strained relationship with donors and loss of research funding.

An even stronger argument is the limitation of divestment as a tool for effective climate change action. The amount of university capital invested in fossil fuels is too small to have an impact on the market. Furthermore, divestment addresses extraction and production but not consumption of fossil fuels. Finally, divesting limits the opportunities universities have for engagement and shareholder activism, the ability to pressure the companies in which they invest to develop climate change strategies, reduce emissions, and forgo questionable lobbying.

Presenters advanced several recommendations for effective shareholder engagement (**Figure 1**).^{*} These Engagement and Advocacy Tools are one category in “The Investor Tool Kit” developed by the presenters to help universities become more active investors. The other category encompasses Portfolio Construction Tools (**Figure 2**).^{*}

The presenters suggested that universities begin by refining the institutional investment beliefs that inform their investment policies and practices. Issues open to examination include the oversight of external fund managers. Not all investment managers consider ESG equally in their investment decisions noted Stephenson and guest speaker Judy Cotte, Vice-President and Head of Corporate Governance & Responsible Investment for RBC Global Asset Management. Accordingly, university administrators are encouraged to ask external investment teams “tough questions” and demand detailed responses.

For instance, unless universities are informed and involved, external managers sometimes leave proxy voting to individual fund managers. Currently underutilized by universities, proxy voting, like shareholder engagement, can be an effective advocacy tool for shaping corporate behaviour. During the workshop, Thomas acknowledged that pooled funds can limit universities’ control over proxy votes. However, the fact that pooled fund managers can vote proportionally according to the position of an individual

Figure 1: Engagement and Advocacy Tools

Shareholder engagement: using role as shareholder to influence corporate behaviour. i.e., engaging in dialogue with company management or filing/co-filing shareholder resolutions.

Proxy voting: instructing investment managers to vote on shareholder resolutions to support ESG-related goals.

Public policy advocacy: supporting public policy efforts to improve transparency and management around ESG issues for investors. i.e., strengthening corporate disclosure requirement.

institution validates university efforts to influence investment teams.

But even if universities invest time and resources into the investor's tool kit, proponents of fossil fuel divestment may still remain skeptical of responsible investing policies, accusing administrators

of greenwashing. It is therefore incumbent upon institutions to demonstrate that the policies are part of a comprehensive effort to support the transition to a low-carbon economy, said presenter Tessa Hebb, Senior Research Fellow and Past Director of the Carleton Centre for Community Innovation at Carleton University.

A comprehensive approach to divestment requests involves dialogue between divestment proponents and institutions around expanding the range of options for meaningful climate action. It includes universities demonstrating that they are willing to leverage their role not only as investors but also as consumers, educators, researchers and innovators. A comprehensive approach encompasses dialogue not only with divestment proponents but also with the broader campus community and other key stakeholders.

This is only one of the recommendations the workshop presenters included in the tool kit they developed to help universities address the issue of fossil fuel divestment campaigns. Nor are these tools limited to the issue of divesting investments from fossil fuels. In fact, the recommendations found in the tool kit are broad enough to help universities address divestment requests of any kind, whatever they may be. *yn*

**The tools have been abridged for the purpose of this article. To read the complete summary of the workshop, including a detailed explanation of the tools in the toolbox, please visit (bit.ly/divestsum).*

Figure 2: Portfolio Construction Tools

Divestment: withdrawing assets from certain companies, industries, or sectors.

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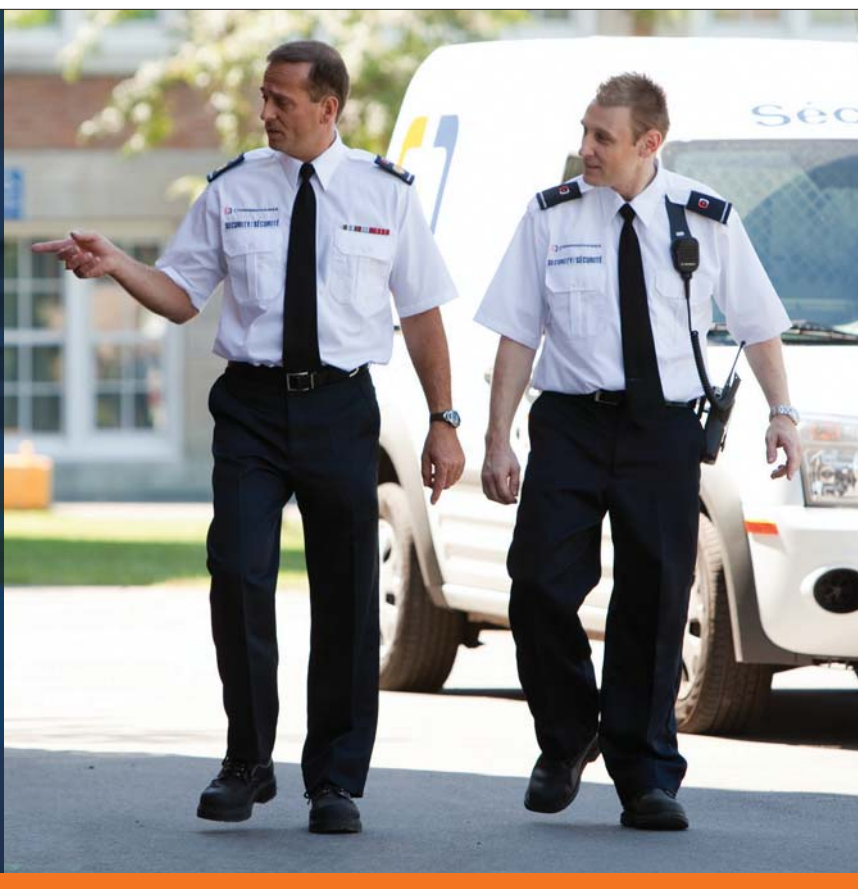


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Désinvestissement :

S'outiller pour répondre de manière efficace, éthique et responsable



Depuis quelques années, les campagnes de désinvestissement qui visent l'industrie des combustibles fossiles sont devenues monnaie courante dans les établissements d'enseignement supérieur canadiens, et on estime que cette tendance est loin de tirer à sa fin. Du 24 au 26 novembre 2016, l'ACPAU a tenu à Toronto un atelier intitulé S'outiller pour répondre de manière efficace, éthique et responsable aux campagnes de désinvestissement. Cet atelier a été conçu pour aider les établissements à répondre aux demandes de désinvestissement de manière à garantir que les responsabilités fiduciaires, les objectifs sociaux et les préoccupations environnementales des établissements sont dûment pris en considération, soigneusement évalués et bien communiqués.

Jusqu'à maintenant, la plupart des universités ont été en mode réaction face aux campagnes de désinvestissement. Elles se sont concentrées sur l'établissement de stratégies pour répondre aux campagnes à mesure qu'elles surviennent. Or, lorsqu'elles adoptent de façon proactive des politiques d'investissement responsable, les universités peuvent aborder ces débats plus sereinement et obtenir de meilleurs résultats.

Les arguments militant en faveur de cette nouvelle approche ne manquent pas. En effet, les administrateurs universitaires évoluent dans un contexte d'investissement en mutation qui tend de plus en plus vers l'investissement responsable, qui tient compte de critères environnementaux,

sociaux et liés à la gouvernance (ESG). Si les fiduciaires ont déjà considéré les critères ESG comme « interdits » puis comme « permmissibles », ils les considèrent aujourd'hui comme « essentiels », rappelle Kevin Thomas, directeur de l'engagement actionnarial à la Shareholder Association for Research and Education et expert invité lors de l'atelier de novembre de l'ACPAU. Ce changement témoigne de l'impact potentiellement important des critères ESG sur les placements, notamment au chapitre de la viabilité à long terme, de la stabilité et de la gestion du risque.

Les campagnes de désinvestissement des énergies fossiles sont celles qu'on a le plus vues sur les campus canadiens dans les cinq dernières années. Selon M. Thomas, on s'attend à ce que les changements climatiques aient de fortes répercussions sur les portefeuilles à cause du risque que

des actifs deviennent « bloqués » et que des actifs subissent des dommages en raison des transformations du climat. Par ailleurs, de plus en plus de conseillers juridiques considèrent désormais la non-prise en compte des risques climatiques comme un manquement à la responsabilité fiduciaire.

Cependant, le désinvestissement n'est pas forcément la réponse. Lors de l'atelier, tous les conférenciers ont insisté sur le fait que les politiques d'investissement responsable constituent une meilleure approche que le désinvestissement pour favoriser des actions concrètes en matière de climat et gérer les risques climatiques. En fait, comme 20 % de l'économie canadienne est liée au secteur de l'énergie, le désinvestissement pourrait poser certaines difficultés, fait remarquer la conférencière Christie Stephenson, directrice générale du Peter P. Dhillon Centre for Business

Figure 1: Outils d'engagement actionnarial et de défense de l'intérêt public

Engagement actionnarial : L'utilisation du statut d'actionnaire pour influencer la conduite d'entreprises (par exemple, le fait d'engager le dialogue avec la direction d'une société ou de déposer des propositions d'actionnaire indépendantes ou conjointes).

Vote par procuration : L'instruction donnée par un actionnaire à un gestionnaire de placements de voter en son nom sur des propositions d'actionnaire appuyant des objectifs liés aux critères ESG.

Défense de l'intérêt public : Le fait de soutenir des politiques publiques de nature à améliorer la transparence et la gestion entourant les questions ESG pour les investisseurs (par exemple, plaider pour le renforcement des obligations d'information des sociétés).

Ethics de la Sauder School of Business de la University of British Columbia. Il pourrait aussi entraîner des relations tendues avec des donateurs ou la perte de sources de financement pour la recherche.

Argument encore plus convaincant aux yeux des présentateurs : les limites du désinvestissement comme moyen d'action contre les changements climatiques. En effet, le capital qu'ont investi les universités dans le secteur des combustibles fossiles n'est pas suffisamment imposant pour que son retrait ait un effet sur le marché. De plus, le désinvestissement du secteur des combustibles fossiles ne touche que les sociétés d'extraction et de production; il n'agit pas sur la consommation de combustibles fossiles ni sur d'autres causes des changements climatiques. Enfin, le désinvestissement entraîne la perte d'occasions d'engagement et d'activisme actionnarial, et limite la capacité des universités à faire pression sur les sociétés dans lesquelles elles investissent pour qu'elles établissent des stratégies climatiques, réduisent leurs émissions et abandonnent leurs activités de lobbying douteuses.

Les présentateurs font plusieurs recommandations visant un engagement actionnarial plus efficace (**Figure 1**).^{*} Ces outils d'engagement actionnarial et de défense de l'intérêt public forment l'une des catégories de la « trousse d'outils de

l'investisseur » créée par les présentateurs pour aider les universités à devenir des investisseurs plus actifs. L'autre catégorie comprend les outils de construction de portefeuilles (**Figure 2**).^{*}

Les conférenciers recommandent aux universités de commencer en précisant les principes devant présider à leurs politiques et pratiques en matière d'investissement. Parmi les enjeux à examiner figure la surveillance des gestionnaires de fonds externes. Tous les gestionnaires ne considèrent pas l'investissement ESG de la même façon, soulignent Mme Stephenson et l'experte invitée Judy Cotte, vice-présidente et chef de la gouvernance et de l'investissement responsable pour RBC Gestion mondiale d'actifs. Elles encouragent donc les administrateurs universitaires à poser « des questions difficiles » aux équipes d'investissement externes et à exiger des réponses détaillées.

Par exemple, à moins que les universités s'informent et décident de s'impliquer dans le processus, les gestionnaires externes laissent parfois les gestionnaires de fonds prendre les décisions pour le vote par procuration. Actuellement sous-utilisé par les universités, le vote par procuration, comme l'engagement actionnarial, peut être un outil de défense de l'intérêt public efficace pour influencer les comportements des sociétés. M. Thomas reconnaît que les fonds en gestion commune peuvent

priver les universités d'un contrôle direct sur les votes par procuration. Il note cependant que les gestionnaires de fonds en gestion commune peuvent voter proportionnellement en fonction des positions d'établissements individuels, et que les universités ont toujours la possibilité d'exprimer leurs préférences aux équipes de placement.

Toutefois, même si les universités consacrent temps et ressources à la trousse d'outils de l'investisseur, les tenants du désinvestissement des combustibles fossiles pourraient mettre en doute la valeur des politiques d'investissement responsables et accuser les administrateurs de ne faire que du « verdissement d'image ». Il incombe donc aux établissements de démontrer que ces politiques s'inscrivent dans un effort plus vaste pour favoriser la transition vers une économie faible en carbone, soutient la présentatrice Tessa Hebb, chercheuse principale et ancienne directrice du Carleton Centre for Community Innovation de la Carleton University.

Une approche complète des demandes de désinvestissement suppose un dialogue entre les tenants du désinvestissement et les établissements pour élargir l'éventail des actions possibles en matière de lutte aux changements climatiques. Dans un tel contexte, les universités doivent démontrer qu'elles sont capables d'agir non seulement à titre d'investisseuses, mais aussi de consommatrices, d'éducatrices, de chercheuses et d'innovatrices. Ce type d'approche nécessite un dialogue non seulement avec les tenants du désinvestissement, mais avec l'ensemble de la communauté universitaire et des partenaires du milieu.

Voilà l'une des nombreuses recommandations que les conférenciers ont intégrées dans la trousse qu'ils ont créée afin d'aider les universités à faire face aux campagnes de désinvestissement de l'énergie fossile. Par ailleurs, ces outils ne se limitent pas à la question du désinvestissement des combustibles fossiles. De fait, les recommandations contenues dans la trousse sont assez larges pour aider les universités à répondre aux demandes de désinvestissement de toutes natures. 

**Les outils sont présentés ici sous forme résumée. Pour lire le compte-rendu complet de l'atelier, qui comprend une explication détaillée des outils que contient la trousse, rendez-vous à l'adresse : (bit.ly/desiapau).*

Figure 2: Outils de construction de portefeuille

Désinvestissement : La cession d'actifs investis dans certaines sociétés ou certains secteurs.

Investissement et réinvestissement ciblés

- Investissement thématique : Cibler des investissements en fonction de tendances macroéconomiques à long terme (p. ex. l'efficacité énergétique et les infrastructures vertes).
- Investissement d'impact : Le fait d'investir avec l'intention de produire un impact positif mesurable au plan social ou environnemental en plus de dégager un rendement financier.

Filtrage et intégration

- Filtrage négatif : Éviter d'investir dans certaines sociétés ou certains secteurs.
- Filtrage positif : Investir en se basant sur le rendement ESG.
- Investissement fondé sur les meneurs ESG d'un secteur : rendement ESG élevé par rapport aux sociétés du même secteur.
- Approche fondée sur un seuil : L'application à tous les investissements d'un seuil de gestion ESG.
- Intégration des critères ESG : La combinaison de l'analyse ESG et de l'analyse financière traditionnelle.

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2017 QUALITY AND PRODUCTIVITY AWARDS

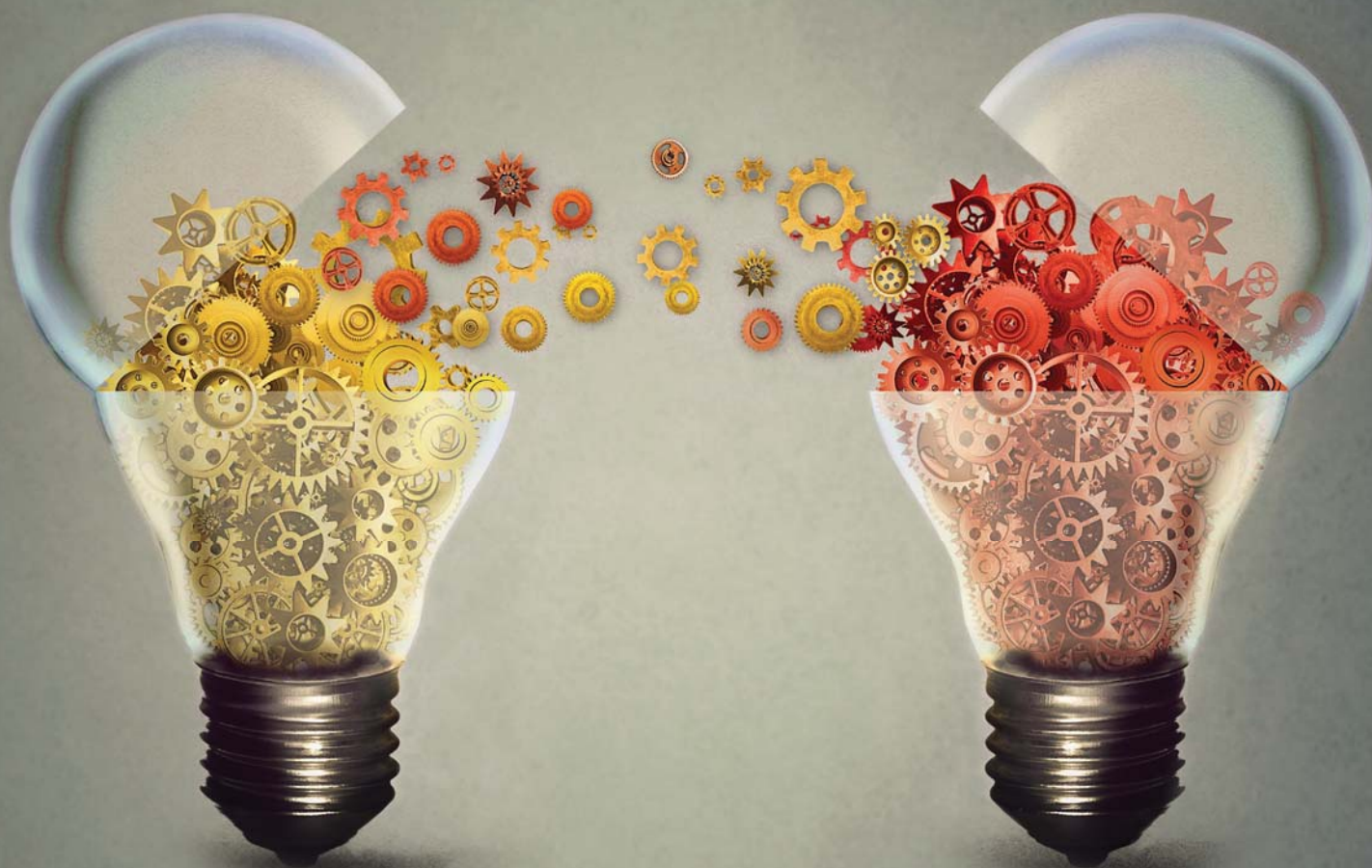


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2017 QUALITY AND PRODUCTIVITY AWARDS

Since 1987, the Canadian Association of University Business Officers (CAUBO) has celebrated the administrative achievements of our members through the Quality & Productivity (Q&P) Awards Program. The simple concept of sharing *good ideas* has grown into an established best practices program that celebrates the successes of our members and provides a venue for spreading the word.

CAUBO promotes the professional and effective delivery of services and administration of resources in all facets of higher education. This annual awards program is designed to recognize, reward and share achievements of administrators in the introduction of new services, improvement in the quality of services provided, and the management of human, financial, and physical resources.

2017 PRIX DE LA QUALITÉ ET DE LA PRODUCTIVITÉ

Depuis 1987, L'Association canadienne du personnel administratif universitaire (ACPAU) souligne les bons coups de ses membres par l'entremise du programme des prix de la qualité et de la productivité. Le concept de départ, qui consistait à communiquer de bonnes idées, a germé; aujourd'hui, il s'agit d'un programme bien établi qui réunit des pratiques exemplaires, met en valeur les réussites de nos membres et constitue un moyen de diffuser ce savoir.

L'ACPAU s'occupe de promouvoir la prestation professionnelle de services et l'administration efficace de ressources dans toutes les facettes de l'enseignement supérieur. Le programme des prix de la qualité et de la productivité vise à récompenser et à faire connaître chaque année les réalisations des administrateurs universitaires, que ce soit pour l'introduction de nouveaux services, l'amélioration de la qualité des services fournis, ou encore la gestion des ressources humaines, financières ou physiques.



CRITERIA

The Q&P Awards are split into two categories: Open and Themed. The 2017 theme is **Achieving and Demonstrating Operational Effectiveness within Higher Education**. The Open category considers submissions that fall under any other topic.

Three national prizes are awarded in each category, and each carries a cash award – \$2,500 for first prize, \$1,500 for second prize, and \$1,000 for third prize. There are also opportunities for Honourable Mentions.

The Selection Committee reserves the right not to give an award if not warranted in its judgment.

Initiatives may be resubmitted by an institution provided they contain additional qualitative and quantitative results.

Four categories are used to evaluate submissions for the Quality and Productivity Awards, leading to a maximum score of 100 points. The scoring factors and point values for each category are as follows:

1. **20% Transferability**
2. **30% Innovation**
3. **25% Quality impact**
4. **25% Productivity impact**

CRITÈRES

Les prix de la qualité et de la productivité sont décernés dans deux catégories : générale et thématique. Le thème de 2017 est : **Atteinte fonctionnelle de l'efficacité opérationnelle en administration de l'enseignement supérieur**. Tous les dossiers ne correspondant pas au thème tombent dans la catégorie générale.

Trois prix nationaux sont décernés dans chaque catégorie, et tous sont accompagnés d'une bourse : 2 500 \$ pour le premier prix, 1 500 \$ pour le deuxième prix et 1 000 \$ pour le troisième prix. Des mentions honorables peuvent aussi être décernées, mais aucune bourse ne sera offerte pour celles-ci.

Le comité de sélection peut décider de ne pas attribuer un prix s'il considère qu'aucune candidature ne le mérite.

Un établissement peut présenter de nouveau une initiative d'une année antérieure à condition de lui avoir apporté des améliorations qualitatives et quantitatives.

Les dossiers sont évalués selon quatre critères. La note globale maximale est de 100 points. Les quatre critères d'évaluation et leur pondération sont les suivants :

1. **20 % Transférabilité**
2. **30 % Innovation**
3. **25 % Impact sur la qualité**
4. **25 % Impact sur la productivité**



FIRST PRIZE, THEMED CATEGORY

Nova Scotia Higher Ed IT Shared Services



(L-R) First Row: Ted Vaughan, Sharon Johnson-Legere, Todd Williams, Eric Tufts, Andre Roberge, Tim MacInnes. Second Row: Monica Foster and Jim Kirk, Dwight Fischer and Ian Nason, Brian Jessop and Karen Smyth, Debbie Rudderham and Gordon MacInnis. Third Row: John Delorey and Andrew Beckett, Gary Doucette and Chris Callbeck, Alex Doyle and Bonnie Sands, Gabrielle Morrison and Perry Sisk.

Cloud Enabled Collaboration & Productivity

As members of the Nova Scotia Higher Ed IT Shared Services Program, the province's 11 post-secondary institutions use a common communication and collaboration platform, providing each institution with cloud-based industry-leading technology at lower costs. A single procurement contract with Microsoft and a shared services project management office allows schools to share implementation plans, policies and best practices, change management and support services, as well as technical migrations and collaborative training. Vice-Presidents Finance and Administration, along with IT leaders from each institution, collaboratively manage the shared IT services.

The Office365 platform has enhanced both mobility and security, while reducing costs. Moving internal email systems and file storage to the cloud resulted in annual savings of \$20,000 to \$200,000 per institution for maintenance, and \$100,000 system-wide in

software licensing fees. In 2015/16, eight shared service projects were completed at a combined saving of nearly \$350,000.

Divested of servers and responsibility for upgrading applications and storage, IT organizations can focus on more value-added activities, including ongoing transformation of service delivery, technology, and collaboration. In the future, the standardized platform could also facilitate sharing networks across multiple institutions. Having leveraged the transferability of core infrastructure and IT systems among its institutions, Nova Scotia has created a model for adoption in other jurisdictions.

For further information on this project, please contact:

Gabrielle Morrison, Vice-President, Finance & Administration,
Saint Mary's University
902-420-5409 | gabe.morrison@smu.ca

SECOND PRIZE, THEMED CATEGORY

McMaster University



(L-R) Denise Van Koughnett, David Ryan, Lynne Serviss, Simon Oakley, Jan Nicholson, Patrick Burke, Diana Parker, Donna Shapiro, Phil Poelmans, and Deidre Henne.

Optimizing Value for Money: Making Connections & Stretching Public Dollars

A strategic review comparing items purchased by all departments across McMaster University to sales of products offered by University Campus Store and Media Production Services (MPS) revealed that increased sales were possible at a cost savings to the buying departments.

Procurement now operates as the lead connection for all buying requests, sourcing first internally before going out for RFP. Working with central support units, ancillaries develop both in-house capabilities and vendors of record. They operate as specialized strategic sourcing agents for departments, providing multiple quotes for internal and/or external production, eliminating tax for the departments, as it is absorbed into ancillary margins.

Since the project was launched in 2015, sales in MPS for burgeoning services, such as web design and custom signage products,

have increased by more than \$240,000 in the first year (82%) and more than \$385,000 the following year (or more than 130% compared to the base pre-launch year). Sales in the campus store increased by more than \$263,000 and more than \$447,000, respectively. Altogether, the departments saved close to \$200,000 in avoidable costs and taxes.

The project is easily replicated across all universities with internal support (store) operations or production departments and a procurement department. The key lies in creating a partnership between the two.

For further information on this project, please contact:

Deidre Henne, Associate Vice-President, Administration & Chief Financial Officer, McMaster University
905-869-0343 | hennedl@mcmaster.ca

THIRD PRIZE, THEMED CATEGORY

Brock University



(L-R) Bryan Boles, Chuck MacLean, Patti Malton, Edward Wall, Cynthia Dawson, Josh Sekel, Lisa Price, Josh Tonnos, and Madhu Dandamudi.

Outsourcing to Create a Streamlined Payment Process

Outsourcing payment processing to Scotiabank allowed Brock University to eliminate the risk-laden and labour-intensive practice of internally printing daily cheques for student refunds, expense reimbursements, supplier invoices, and ad hoc needs. Gone are the risks of being unable to make payments due to printer failure or restricted access during a labour disruption.

Money transfers have virtually eliminated requests for student payment reissues from cheques mailed to unreliable addresses, along with labour hours devoted to canceling cheques and reissuing payments. The nominal per transfer cost is comparable to the cost of postage and printing cheques. Student familiarity with online banking has ensured a seamless transition.

Scotiabank now processes supplier invoices and ad hoc payments on behalf of the University at a nominal fee per cheque.

The full-time clerk formerly responsible for printing and mailing the cheques has been redeployed to other areas of need, while payments to suppliers have been grouped into one weekly cheque, reducing the number of cheques by 50%. Resulting cost savings have enabled the University to reallocate resources to other value-added tasks in accounts payable.

All universities can have access to outsourcing from financial services; the risk eliminated and efficiencies realized would be comparable across most institutions.

For further information on this project, please contact:

Bryan Boles, Associate Vice-President, Financial Services,
Brock University
905-688-5550 x6133 | bboles@brocku.ca

FIRST PRIZE, OPEN CATEGORY

University of Toronto



(L-R) Ray Cheung, Jessica Dawe, Gord Robins, Cecille Agmata, Darrel Fernandopulle, Sam D'Angelo, Mark Simpson, Dione Dias, and Radu Ciotirca. (Not pictured) Ron Swail.

Out of the Dark Ages and into the Light: The Triple Bottom Line Work Environment

The University of Toronto used a triple bottom line approach to sustainability in construction of the Administrative Offices at the Examination Centre, incorporating environmental, social and economic factors. By repurposing an old warehouse, the LEED Gold project used less embedded energy than a new construction, and recycled almost all construction waste. The new, smaller building also boasts lower water and energy consumption.

Focused on maximizing space efficiencies, best practice interior design combined higher staff density with greater amenity space at a reduced occupancy cost (more than \$1 million in savings since September 2008). Featuring operable windows, unobstructed views to the outdoors, ample natural light, and low VOC furnishings, the work environment has improved productivity and staff morale.

An open layout, ergonomic office furniture, communal lunchroom, reconfigurable meeting spaces, and trophy wall showcasing

departmental achievements further enhance communication and collaboration. Staff in open workstations have extra storage space and access to several "phone booths" for private conversations or phone calls. The new design premise launched the virtual workers program, allowing and encouraging certain job functions to work outside the office either from home or where their customers are located.

This project is readily transferable to any office space in any organization.

For further information on this project, please contact:
Ron Swail, Chief Operations Officer, Property Services & Sustainability, University of Toronto
416-978-5098 | ron.swail@utoronto.ca

SECOND PRIZE, OPEN CATEGORY

York University



(L-R) Greg Langstaff, Rose Orlando, Rob Finlayson, Laura Ubaldi, Brendan Schulz, and Ross McMillan.

YU START: York's Online Transition Program

Launched in 2015, YU START is an online transition tool providing a more comprehensive, effective and efficient way to enrol, transition, and orient incoming students. YU START offers an online enrolment tutorial, interactive University 101 platform, student-leader facilitated Facebook groups, and campus tour, culminating in-person on York Orientation Day.

Fully integrated with York's Student Information System, YU START offers an ever-evolving customized user experience, with specific content for international students, varsity athletes, mature students and those in residence. By completing University 101 during the summer, students receive a co-curricular credit while acquiring information they need before arriving on campus.

In 2016, students connected with each other and received support from trained upper-year mentors through 12,000 posts in

33 YU START Facebook groups. More than 7,000 of 9,400 students enrolled for first-year courses online using the enrolment tutorial, allowing academic advisers more time to focus on those needing in-person assistance, including upper year students. Attendance at orientation increased by 11% from 2015 and 2016, while participants in YU START had a 1.35% higher first-to-second-year persistence rate than non-participants.

With easily replicable guiding documents and video tutorials, YU START could serve as a model for any school to adapt and implement.

For further information on this project, please contact:

Ross McMillan, Director, Student Engagement & First-Year Experience, York University
416-736-2100 x70720 | rossm@yorku.ca

THIRD PRIZE, OPEN CATEGORY

Simon Fraser University



(L-R) Hon-Man Wong, Oskar Pienkos, Randy Raine, Stephanie Stewart, and Mike Stanger. (Not pictured) Ilya Berezin, Eryn Holbrook, Wolfgang Richter, and Mark Roman.

SFU Vault: A Cloud Storage and File Sharing Solution for Faculty, Staff, and Students

In 2015, Simon Fraser University launched the *SFU Vault*, a FIPPA (Freedom of Information and Protection of Privacy Act)-compliant enterprise file synchronization and sharing solution. Hosted on servers in SFU's data centre, this resilient and highly-performant private cloud service provides easy file sharing between teams or individual users, and fosters collaboration from external access points. Faculty, staff, and students with an active SFU computing ID receive a space quota of 50 GB.

Using open source software, the *SFU Vault* leverages state-of-the-art web and database technology to deliver scalable cloud file software. Easy to learn, the system provides access to files from anywhere and across all devices and platforms, uses versioning control, and automatically backs up data.

Previously, traffic resulting from synchronizing devices between SFU secured network and the commercial file storage solution

Dropbox consumed 15% of bandwidth. From April 2016 to January 2017, with thousands of users simultaneously using *SFU Vault*, the university saw a 47% drop in traffic consumed by Dropbox. Meanwhile, the level of service has remained comparable to a commercial file provider while remaining well within budgetary constraints.

Local hosting, open software, and a focus on the needs of higher education make this scalable cloud file sharing solution ideal for adoption across the university sector.

For further information on this project, please contact:

Mark Roman, Chief Information Officer

Simon Fraser University

778-237-0135 | mproman@sfu.ca

HONOURABLE MENTION, THEMED CATEGORY

Carleton University



(L-R) Valerie Pereboom, Sandy Tsoukanas, Terrence Odin, Sangeetha Nair, Amanda Bennett, Norah Vollmer, Greg Skazyk, and Susan Simmons. (Not pictured) Brian Gillam, and Stacey Noah.

Online Faculty Career Data Systems

In August 2016, the Faculty Affairs in the office of the Provost in collaboration with Information Technology Services replaced the time-consuming, paper-driven faculty leaves system with a process that enables submission and review of applications online. Email notifications are now sent to applicants and all approvers, and Banner – the financial software – is updated automatically. The system also reminds applicants upon their return to submit a sabbatical report for review and approval by the Dean and Provost.

The online Faculty Careers System has eliminated a time lag of approximately five days per transaction on approximately 6,500 annual transactions, along with the need to maintain paper files. Review and approval now takes 30 minutes per transaction. The transfer of files from one reviewer/approver to another is instantaneous and reviewers/approvers have online access to common information required for decision-making. Tracking and automatic systems notifications have eliminated the need for frequent status inquiries and separate communications, including signed letters.

The system has increased the efficiency, accuracy, and timeliness of the faculty leaves management process. Carleton University would be happy to share this in-house technology, including programming code, workflows, manuals, and other information with other institutions at the regional and national levels.

For further information on this project, please contact:
Norah Vollmer, Faculty Affairs, Office of the Provost and Vice-President Academic, Carleton University
 613-520-2600 x4156 | norah.vollmer@carleton.ca

HONOURABLE MENTION, OPEN CATEGORY

Cape Breton University

Cape
Breton
University
Happen.



(L-R) First row: Dale Keefe, Gordon MacInnis, Donnie MacIsaac, and Kelly Browne. Second Row: John Brereton, Donnie Hamilton, and Austen Hughes.

The Power of Wind Farms: North America's First Carbon Neutral Campus

In January 2016, Cape Breton University (CBU) completed the development of a three-turbine 5.4 MW wind farm across from their campus that generates an estimated 16,200 MWh of electrical energy annually, equivalent to an offset of 15,400 tonnes of CO₂. Total emissions from all energy sources consumed on campus were estimated to be just over 8,000 tonnes equivalent of CO₂, making CBU the first North American university to completely offset all its direct CO₂ emissions.

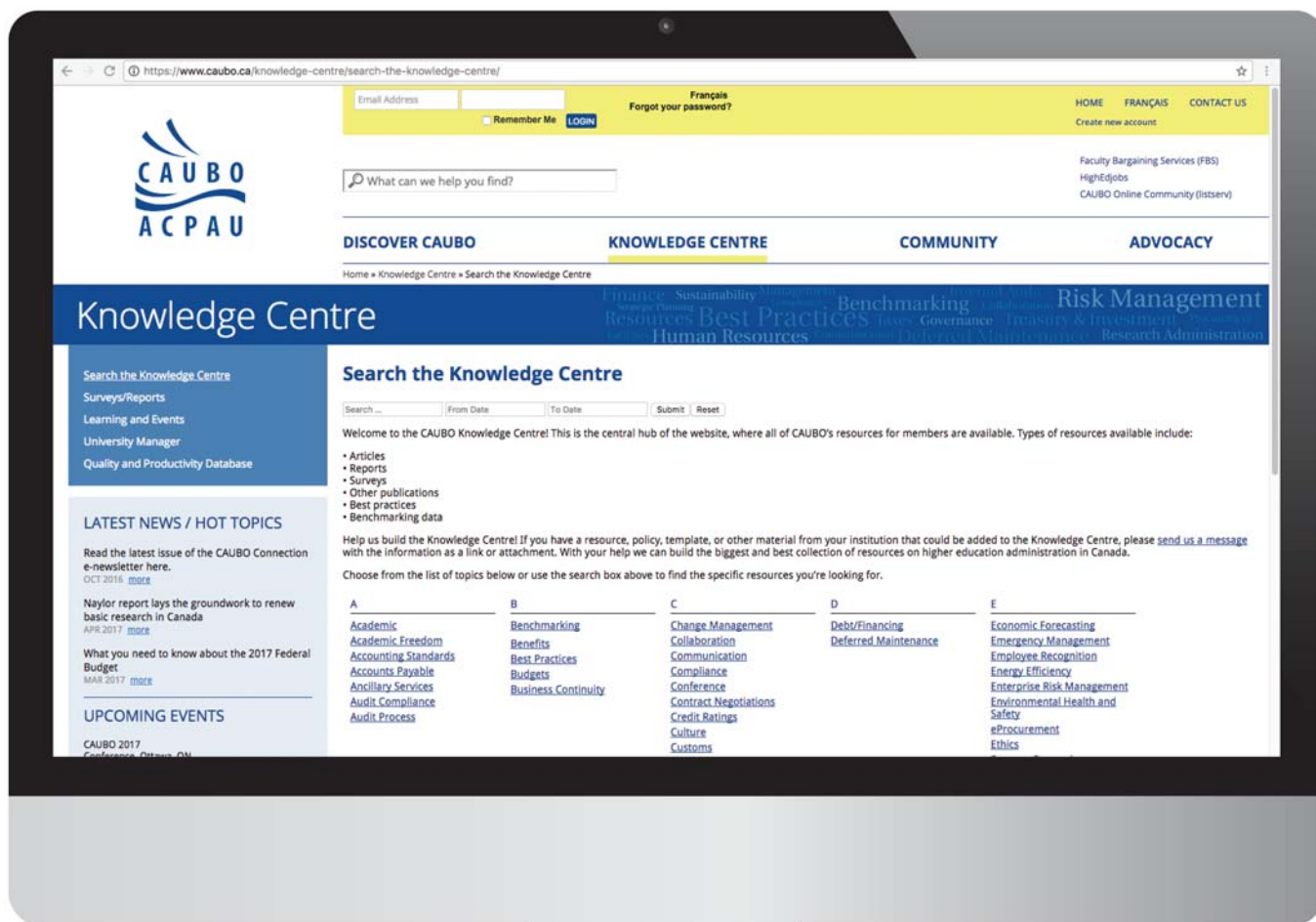
For the project, CBU partnered with wind developer Natural Forces, turbine suppliers Enercon, RBC, Nova Scotia Power Inc., and Efficiency Nova Scotia. The province of Nova Scotia awarded CBU a Community Feed-In Tariff. The facility is now owned and operated by Gardner Mines Wind Farm LP, with the CBU Business Trust as the 89% partner.

In most areas of the country, the cost to generate electrical energy is less than the cost to purchase power. At CBU, the excess revenue from the wind farm project provides an additional revenue stream for the university of about \$500K per year.

For further information on this project, please contact:
Gordon M. MacInnis, Vice-President, Finance and Operations,
 Cape Breton University
 902-563-1991 | gordon_macinnis@cbu.ca

HUNDREDS OF BEST PRACTICES AT YOUR FINGERTIPS...

The Q&P database, available in the CAUBO Knowledge Centre, is where you can explore best practices to help you find solutions to issues, opportunities for improved operations, and better on-campus experiences. Submissions going back to 2004 can be searched by keyword, year, or by institution to find innovative practices that can be applied to your institution today!



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It's not too early to start thinking about your submission for 2018!

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For a complete description of the criteria and application process, and for details regarding previous submissions and winners, visit our website at www.caubo.ca or contact Laura Lamarche at llamarche@caubo.ca.

Pour obtenir une description complète des critères et du processus de mise en candidature, ainsi que de l'information sur les candidats et lauréats des années passées, consultez notre site Web à www.acpau.ca ou communiquez avec Laura Lamarche, à l'adresse llamarche@acpau.ca.

PREMIER PRIX, CATÉGORIE THÉMATIQUE

Services partagés de TI pour l'enseignement supérieur en Nouvelle-Écosse



(G-D) 1^{ère} rangée : Ted Vaughan, Sharon Johnson-Legere, Todd Williams, Eric Tufts, Andre Roberge, Tim MacInnes. 2^{ème} rangée : Monica Foster et Jim Kirk, Dwight Fischer et Ian Nason, Brian Jessop et Karen Smyth, Debbie Rudderham et Gordon MacInnis. 3^{ème} rangée : John Delorey et Andrew Beckett, Gary Doucette et Chris Callbeck, Alex Doyle et Bonnie Sands, Gabrielle Morrison et Perry Sisk.

Collaboration et productivité grâce au nuage

En tant que membres du Nova Scotia Higher Ed IT Shared Services Program, les 11 établissements d'enseignement postsecondaire de la province utilisent une plate-forme de communication et de collaboration commune leur donnant accès à moindre coût à une technologie de pointe basée sur l'infonuagique. Un simple contrat d'achat avec Microsoft et un bureau offrant des services de gestion de projets partagés permet aux écoles de mettre en commun les plans de mise en œuvre, les politiques et les pratiques exemplaires, la gestion du changement et les services de soutien, ainsi que les migrations techniques et la formation collaborative. Les vice-recteurs aux finances et à l'administration, ainsi que les responsables informatiques de chaque établissement gèrent les services informatiques partagés en collaboration.

La plate-forme Office365 a permis d'améliorer la mobilité et la sécurité, tout en réduisant les coûts. Le déplacement des systèmes de messagerie internes et le stockage de fichiers dans le nuage

ont généré des économies annuelles de 20 000 \$ à 200 000 \$ par établissement pour l'entretien, et de 100 000 \$ en frais de licence des logiciels pour l'ensemble du système. En 2015-2016, huit projets de services partagés ont été achevés et ont généré une économie combinée de près de 350 000 \$.

À l'avenir, la plate-forme normalisée pourrait également faciliter le partage de réseaux entre plusieurs établissements. Après avoir tiré parti de la transférabilité des infrastructures de base et des systèmes informatiques entre ses établissements, la Nouvelle-Écosse a créé un modèle qui pourrait être adopté dans d'autres provinces ou territoires.

Pour de plus amples informations sur ce projet, veuillez communiquer avec :

Gabrielle Morrison, vice-rectrice, Finance et administration,
Saint Mary's University
902-420-5409 | gabe.morrison@smu.ca

DEUXIÈME PRIX, CATÉGORIE THÉMATIQUE **McMaster University**



(G-D) Denise Van Koughnett, David Ryan, Lynne Serviss, Simon Oakley, Jan Nicholson, Patrick Burke, Diana Parker, Donna Shapiro, Phil Poelmans, et Deidre Henne.

Optimisation du rapport qualité-prix : établir des liens et utiliser les fonds publics au maximum

Un examen stratégique comparant les articles achetés par tous les départements de la McMaster University aux ventes de produits offerts par le magasin du campus et les services de production médiatique (SPM) a révélé qu'il était possible d'augmenter les ventes tout en réduisant les coûts assumés par les départements acheteurs.

Le service d'approvisionnement est désormais le lien principal de toutes les demandes d'achat. En effet, les départements s'approvisionnent à l'interne d'abord avant de publier une demande de propositions (DP) à l'externe. En travaillant avec les unités de soutien central, les services auxiliaires acquièrent des capacités à l'interne et mettent sur pied des registres de fournisseurs. Ils fonctionnent comme des agents d'approvisionnement stratégiques spécialisés pour les départements et fournissent plusieurs devis internes ou externes, éliminant ainsi la taxe qui est absorbée dans les marges des services auxiliaires.

Depuis le lancement du projet en 2015, les ventes des SPM pour les services florissants comme la conception de sites web et les

produits de signalisation personnalisée ont augmenté de plus de 240 000 \$ la première année (82%) et de plus de 385 000 \$ l'année suivante (ou plus de 130 % par rapport à l'année de référence précédant le lancement). Les ventes du magasin du campus ont augmenté de plus de 263 000 \$ et de plus de 447 000 \$, au cours des mêmes périodes. Au total, les départements ont économisé près de 200 000 \$ en coûts et taxes évitables.

Le projet est facile à reproduire dans toutes les universités avec des services de soutien interne (magasin) et un service d'approvisionnement. La clé réside dans la création d'un partenariat entre les deux.

Pour de plus amples informations sur ce projet, veuillez communiquer avec :

Deidre Henne, vice-rectrice associée, Administration et chef de la direction financière, McMaster University
905-869-0343 | hennedl@mcmaster.ca

TROISIÈME PRIX, CATÉGORIE THÉMATIQUE

Brock University



(G-D) Bryan Boles, Chuck MacLean, Patti Malton, Edward Wall, Cynthia Dawson, Josh Sekel, Lisa Price, Josh Tonnos, et Madhu Dandamudi.

L'externalisation pour créer un processus de paiement rationalisé

La sous-traitance du traitement des paiements à la Banque Scotia a permis à la Brock University d'éliminer une pratique risquée et exigeante en main-d'œuvre, à savoir l'impression quotidienne à l'interne de chèques pour les remboursements destinés aux étudiants, les remboursements de frais, les factures des fournisseurs et autres besoins particuliers. Cette pratique élimine le risque de ne pas pouvoir effectuer de paiements en raison d'une panne d'imprimante ou d'un accès restreint pendant un conflit de travail.

Les virements de fonds ont pratiquement éliminé les demandes de réémissions de paiements aux étudiants parce que les chèques étaient envoyés par la poste à une adresse erronée, ainsi que les heures de travail consacrées à l'annulation des chèques et à la réémission des paiements. Le coût nominal par virement est comparable au coût des chèques postaux et de l'impression. Le fait que les étudiants connaissent bien les services bancaires en ligne a permis d'assurer une transition en douceur.

La Banque Scotia traite maintenant les factures des fournisseurs et les paiements spéciaux pour le compte de l'Université à un prix nominal par chèque. Le commis à temps plein auparavant responsable de l'impression et de l'envoi des chèques a été réaffecté à d'autres tâches, et les paiements des fournisseurs ont été regroupés en un seul chèque hebdomadaire, réduisant ainsi de moitié le nombre de chèques. Les économies réalisées ont permis à l'Université de réaffecter des ressources à d'autres tâches à valeur ajoutée dans le service des comptes fournisseurs.

Toutes les universités peuvent avoir accès à l'externalisation des services financiers; le risque éliminé et l'efficacité obtenue seraient comparables dans la plupart des établissements.

Pour de plus amples informations sur ce projet, veuillez communiquer avec :

Bryan Boles, vice-recteur associé, Services financiers,
Brock University
905-688-5550 poste 6133 | bboles@brocku.ca

PREMIER PRIX, CATÉGORIE GÉNÉRALE

University of Toronto



(G-D) Ray Cheung, Jessica Dawe, Gord Robins, Cecille Agmata, Darrel Fernandopulle, Sam D'Angelo, Mark Simpson, Dione Dias, et Radu Ciotirca. (Absent de cette photo) Ron Swail.

Sortir de l'âge des ténèbres pour avancer vers la lumière : un environnement de travail axé sur un triple résultat

La University of Toronto a utilisé une approche de la durabilité axée sur un triple résultat dans la construction des bureaux administratifs du centre d'examen en intégrant les facteurs environnementaux, sociaux et économiques (ESG). En réaménageant un ancien entrepôt, le projet LEED Gold a utilisé moins d'énergie grise que l'érection d'un nouveau pavillon et a permis de recycler presque tous les déchets de construction. Le nouveau bâtiment plus petit permet également une diminution de la consommation d'eau et d'énergie.

Pour maximiser l'espace et s'inspirant de pratiques exemplaires en matière de design d'intérieur, l'Université a combiné la densité accrue du personnel et un plus grand espace de services tout en réduisant le coût d'occupation (plus d'un million de dollars d'économies depuis septembre 2008). Grâce aux fenêtres mobiles, à la vue imprenable sur l'extérieur, à la lumière naturelle abondante et au mobilier fabriqué avec des matériaux comprenant peu de COV, l'environnement de travail a permis d'améliorer la productivité et le moral du personnel.

L'espace ouvert, le mobilier de bureau ergonomique, la salle à manger commune, les espaces de réunion reconfigurables et le mur des trophées mettant en vedette les réalisations des départements améliorent davantage la communication et la collaboration. Le personnel travaillant dans les postes à aire ouverte a un espace de rangement supplémentaire et a accès à plusieurs « cabines téléphoniques » pour les conversations ou les appels privés. Le nouveau design du bâtiment a permis le lancement du programme de travail « virtuel », ce qui permet aux employés de travailler à l'extérieur du bureau, soit à la maison ou à l'endroit où se trouvent leurs clients, et les y invite.

Ce projet est facilement transférable à n'importe quel espace de bureau dans toute organisation.

Pour de plus amples informations sur ce projet, veuillez communiquer avec :

Ron Swail, chef des opérations, Gestion des immeubles et durabilité, University of Toronto
416-978-5098 | ron.swail@utoronto.ca

DEUXIÈME PRIX, CATÉGORIE GÉNÉRALE Université York



(G-D) Greg Langstaff, Rose Orlando, Rob Finlayson, Laura Ubaldi, Brendan Schulz, et Ross McMillan.

YU START : Programme de transition en ligne de York

Lancé en 2015, YU START est un outil de transition en ligne offrant une manière plus complète, efficace et efficiente d'inscrire les nouveaux étudiants, de les aider à faire la transition et de les orienter. YU START offre un tutoriel d'inscription en ligne, une plate-forme interactive Université 101, des groupes Facebook animés par des étudiants et une visite du campus qui se termine par une journée d'orientation en personne à l'Université.

Entièrement intégré au système d'information sur les étudiants de York, YU START offre une expérience utilisateur personnalisée en constante évolution. La plate-forme comprend un contenu propre aux étudiants étrangers, aux athlètes universitaires, aux étudiants adultes et à ceux qui vivent en résidence. En suivant le cours Université 101 à l'été, les étudiants reçoivent un crédit parascolaire tout en obtenant les informations dont ils ont besoin avant leur arrivée sur le campus.

En 2016, les étudiants ont tissé des liens entre eux et ont reçu le soutien de mentors formés (des étudiants des années supérieures) par l'entremise de 12000 messages dans 33 groupes YU START

sur Facebook. Plus de 7000 des 9400 étudiants se sont inscrits à des cours de première année en ligne en utilisant le tutoriel d'inscription, ce qui a permis aux conseillers pédagogiques d'accorder plus de temps à ceux qui avaient besoin d'aide en personne, y compris aux étudiants des années supérieures. La participation à l'activité d'orientation a augmenté de 11 % de 2015 à 2016, et le taux de persévérance scolaire des participants à YU START entre la première et la deuxième année était supérieur de 1,35 % à celui des non-participants.

Étant donné que les documents d'orientation et les tutoriels sur vidéo sont facilement reproductibles, YU START pourrait servir de modèle à tout établissement qui voudrait l'adapter et le mettre en œuvre.

Pour de plus amples informations sur ce projet, veuillez communiquer avec :

Ross McMillan, directeur, Engagement des étudiants et expérience de la première année, Université York
416-736-2100 poste 70720 | rossm@yorku.ca

TROISIÈME PRIX, CATÉGORIE GÉNÉRALE

Simon Fraser University



(G-D) Hon-Man Wong, Oskar Pienkos, Randy Raine, Stephanie Stewart, et Mike Stanger. (Absents de cette photo) Ilya Berezin, Eryn Holbrook, Wolfgang Richter, et Mark Roman.

SFU Vault : Un stockage dans le nuage et une solution de partage de fichiers pour le corps professoral, le personnel et les étudiants

En 2015, la Simon Fraser University a lancé à la grandeur de l'établissement le SFU Vault, une solution de synchronisation de fichiers et de partage conforme à la *Loi sur l'accès à l'information et la protection de la vie privée*. Hébergé sur les serveurs du centre de données de l'Université, ce service infonuagique privé résilient et hautement performant permet un partage de fichiers facile entre les équipes ou les utilisateurs individuels et favorise la collaboration à partir des points d'accès externes. Le corps professoral, le personnel et les étudiants ayant un compte informatique actif à l'Université ont droit à 50 Go d'espace de stockage.

En utilisant un logiciel ouvert, le SFU Vault tire parti de la technologie de pointe du Web et des bases de données pour fournir un logiciel de gestion de fichiers infonuagiques évolutif. Ce système convivial permet d'accéder aux fichiers de n'importe où et de n'importe quel appareil ou plate-forme, gère les versions et sauvegarde automatiquement les données.

Auparavant, le trafic résultant de la synchronisation des dispositifs entre le réseau sécurisé de l'Université et la solution commerciale

de stockage de fichiers sur Dropbox occupait 15 % de la bande passante. D'avril 2016 à janvier 2017, avec des milliers d'utilisateurs connectés simultanément à SFU Vault, l'Université a connu une baisse de 47 % du trafic occupé par Dropbox. Et le niveau de service est resté comparable à celui d'un fournisseur commercial de fichiers tout en respectant les contraintes budgétaires.

L'hébergement local, les logiciels libres et l'accent mis sur les besoins de l'enseignement supérieur font en sorte que cette solution évolutive de partage de fichiers en infonuagique est idéale et peut être adoptée dans tout le secteur universitaire.

Pour de plus amples informations sur ce projet, veuillez communiquer avec :

Mark Roman, directeur de l'information,
Simon Fraser University
778-237-0135 | mproman@sfu.ca

MENTION HONORABLE, CATÉGORIE THÉMATIQUE

Carleton University



(G-D) Valerie Pereboom, Sandy Tsoukanas, Terrence Odin, Sangeetha Nair, Amanda Bennett, Norah Vollmer, Greg Skazyk, et Susan Simmons. (Absents de cette photo) Brian Gillam, et Stacey Noah.

Système de gestion en ligne des congés du corps professoral

En août 2016, les affaires professorales du bureau du vice-recteur principal, en collaboration avec les services des technologies de l'information, ont remplacé le système de gestion des congés du corps professoral par un processus permettant la soumission et l'examen des demandes en ligne. Des avis sont envoyés par courriel aux demandeurs et à toutes les personnes chargées des approbations, et Banner est mis à jour automatiquement. Le système rappelle également aux candidats de soumettre un rapport sur leur congé sabbatique à leur retour pour examen et approbation par le doyen et le vice-recteur principal.

Ce système de gestion en ligne élimine un délai d'environ cinq jours par transaction pour près de 6500 transactions annuelles, ainsi que la nécessité de maintenir des dossiers papier. L'examen et l'approbation prennent désormais 30 minutes par transaction. Le transfert de fichiers d'un examinateur/approbateur à un autre est instantané, et ces personnes ont accès en ligne aux données communes nécessaires à la prise de décision. Le suivi et les avis automatiques émis ont éliminé les fréquentes requêtes concernant l'état de la demande et les communications distinctes.

Le système a augmenté l'efficacité, la précision et la rapidité du processus de gestion des congés du corps professoral. L'Université serait heureuse de transmettre cette technologie interne, y compris le code de programmation, les flux de travail, les manuels et les autres informations à d'autres établissements à l'échelon régional et national.

Pour de plus amples informations sur ce projet, veuillez communiquer avec :

Norah Vollmer, affaires professorales, Bureau du vice-recteur principal et vice-recteur à l'enseignement, Carleton University
613-520-2600 poste 4156 | norah.vollmer@carleton.ca

MENTION HONORABLE, CATÉGORIE OUVERTE

Cape Breton University

Cape
Breton
University
Happen.



(G-D) Haut: Dale Keefe, Gordon MacInnis, Donnie MacIsaac, et Kelly Browne. Bas: John Brereton, Donnie Hamilton, et Austen Hughes.

La puissance des parcs éoliens : premier campus carboneutre en Amérique du Nord

En janvier 2016, la Cape Breton University (CBU) a terminé la construction d'un parc éolien à trois turbines de 5,4 MW en face de son campus, qui génère environ 16200 MWh d'énergie électrique par an, ce qui compense des émissions de 15400 tonnes de CO₂. Les émissions totales de toutes les sources d'énergie consommées sur le campus ont été estimées à un peu plus de 8000 tonnes équivalent CO₂, faisant de la CBU la première université nord-américaine à compenser entièrement toutes ses émissions directes de CO₂.

Pour le projet, la CBU a formé un partenariat avec le fabricant d'éoliennes Natural Forces, les fournisseurs de turbines Enercon, RBC, Nova Scotia Power Inc., et Efficiency Nova Scotia. Le gouvernement néoécossais a accordé une tarification communautaire incitative. L'installation est maintenant détenue et exploitée par Gardner Mines Wind Farm LP, et le CBU Business Trust en est partenaire à 89 %.

Dans la plupart des régions du pays, le coût de production d'énergie électrique est inférieur au coût d'achat de l'électricité. L'excédent des recettes du projet de parc éolien fournit une source de revenus supplémentaires d'environ 500000 \$ par an à l'Université.

Pour de plus amples informations sur ce projet, veuillez communiquer avec :

Gordon M. MacInnis, vice-recteur, Finances et opérations, Cape Breton University
902-563-1991 | gordon_macinnis@cbu.ca

DES CENTAINES DE PRATIQUES EXEMPLAIRES À VOTRE PORTÉE

La base de données Qualité et productivité, accessible via le Centre du savoir de l'ACPAU, vous permettra d'explorer de bonnes pratiques qui vous aideront à résoudre des problèmes, à améliorer vos façons de faire et à offrir de meilleures expériences sur campus.

Trouver des pratiques novatrices applicables à votre établissement par mot-clé, par année (jusqu'à 2004) ou par établissement.



The screenshot shows the ACPAU Knowledge Centre website. The header includes the CAUBO ACPAU logo, a search bar, and navigation links. The main content area is titled 'Centre du savoir' and features a search bar, a list of resources, and a table of contents.

Centre du savoir

Rechercher ... De (date) ... Au (date) ... Soumettre Réinitialiser

Bienvenue dans le Centre du savoir de l'ACPAU! Il s'agit de la partie centrale du site Web, là où les membres peuvent consulter toutes les ressources de l'ACPAU, notamment :

- des articles
- des rapports
- des sondages
- d'autres types de publications
- des pratiques exemplaires
- des données de référence

Aidez-nous à enrichir le Centre du savoir! Si votre établissement dispose d'une ressource, d'une politique, d'un modèle ou de tout autre matériel pouvant être ajouté au Centre du savoir, veuillez nous envoyer un message contenant l'information sous forme de lien ou de pièce jointe. Votre aide nous permettra d'assembler la plus complète et la meilleure des collections de ressources sur l'administration de l'enseignement supérieur au Canada.

Pour trouver des ressources précises, vous pouvez soit sélectionner un sujet parmi ceux énumérés ci-dessous, soit effectuer une recherche par mots-clés en utilisant la boîte de recherche.

A	C	E	F	G
Administration de la recherche	Conformité	Entretien différé	Fiscalité	Gestion des risques
Affectation des ressources	Congrès	Exploitation et entretien		Gestion du risque d'entreprise
Audit interne	Continuité des activités			Gestion financière
Article 211	Coûts indirects de la recherche			Gestion universitaire
Avantages imposables				Gouvernance

ÉVÉNEMENTS À VENIR

POUR CONSULTER LA BASE DE DONNÉES, RENDEZ-VOUS AU www.acpau.ca.

LIST OF SUBMISSIONS / LISTE DES SOUMISSIONS

Institution Établissement	Title of Proposal Titre de la proposition	Contact Person Personne Ressource	Telephone/Email Téléphone/Courriel
Brock University	Moving Finance into the Cloud	Bryan Boles	905-688-5550 jsekel@brocku.ca
Brock University	Single Purchasing and Travel Expense Card Roll Out to Entire Campus	Josh Tonnos	905-688-5550 jsekel@brocku.ca
Brock University	Outsourcing to Create a Streamlined Payment Process	Josh Tonnos	905-688-5550 x6133 jtonnos@brocku.ca
Cape Breton University	The Power of Wind Farms: North America's First Carbon Neutral Campus	Gordon M. MacInnis	902-563-1991 shauna_kelly@cbu.ca
Carleton University	Online Faculty Career Data Systems	Norah Vollmer	613-520-2600 ext 4156 norah.vollmer@carleton.ca
McGill University	McGill Supplies Manager Solution – A Cross Road Where Inventory Management, Procurement Strategies and Compliance Meet	Youssef Azad	514-398-2348 youssef.azad@mcgill.ca
McGill University	The Macdonald Campus Energy Project: Building Infrastructure for the Future	Denis Mondou	514-398-8192 denis.mondou@mcgill.ca
McGill University	One of North America's Largest University Web Publishing Platforms, from Marketing Campaigns to Basic Information Websites	Karl Jarosiewicz	514-398-3151 karl.jarosiewicz@mcgill.ca
McGill University	Fostering a Dynamic Ecosystem for Experiential Learning at McGill's Macdonald Campus	Eduardo Ganem Cuenca	514-398-8779 eduardo.ganemcuenca@mcgill.ca
McGill University	Vision 2020: A Collaborative and Innovative Sustainability Strategy for McGill University	Francois Miller	514-398-4675 francois.miller@mcgill.ca
McMaster University	Optimizing Value for Money: Making Connections & Stretching Public Dollars!	Deidre (Dee) Henne	905-869-0343 hennedl@mcmaster.ca
Queen's University	Queen's New (Activity-Based) Budget Model	Alan Harrison	613-985-3148 alan.harrison@queensu.ca
Ryerson University	Say Thanks - Informal Employee Recognition Initiative	Emily Pomeroy	416-979-5000 ext. 6250 epomeroy@ryerson.ca
Saint Mary's University (NS)	Nova Scotia Higher Ed IT Shared Services	Gabrielle Morrison (SMU)	902-420-5409 gabe.morrison@smu.ca
Simon Fraser University	SFU vault: A Cloud Storage and File Sharing Solution for Faculty, Staff, and Students	Mark Roman	778-237-0135 mproman@sfu.ca
Simon Fraser University	Improving Understandability and Impact: Applying a Well-being Lens to Policies and Procedures	Tara Black	778-782-4587 tblack@sfu.ca

Institution Établissement	Title of Proposal Titre de la proposition	Contact Person Personne Ressource	Telephone/Email Téléphone/Courriel
Simon Fraser University	Process Improvement – Risk Assessment and Inspection	Melinda Skura	778-782-7264 melinda_skura@sfu.ca
The University of British Columbia	Transforming Operations Through Better Communications	Chris Freek	604-827-0641 chris.freek@ubc.ca
The University of Winnipeg	Managing Campus Expansion in an Era of Climate Change	Annette Trimbee	204-789-1479 a.lajoie-omalley@uwinnipeg.ca
The University of Winnipeg	THE SMRT (Sexual Misconduct Response Team): An Innovative Approach to Sexual Violence Response on Campuses	Jan Byrd	204-293-8573 j.byrd@uwinnipeg.ca
Université du Québec à Chicoutimi	Amélioration du taux d'inscription des étudiants de l'Université du Québec à Chicoutimi / Boosting Student Registration Rates at Université du Québec à Chicoutimi (UQAC)	Cindy Deschênes	581-306-5663 cindy.deschenes@uqac.ca
University of Alberta	Strategic Planning for Sustainability	Trina Innes	780-492-7162 tinnes@ualberta.ca
University of Manitoba	Incorporating Sustainability into University Governance: Sustainability Strategy 2016-2018	Andrew Konowalchuk	204-474-6121 sustainability@umanitoba.ca
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Work, play, joy:

My all-too-brief Faculty Bargaining Services career

By David Graham, Vice-President Academic and Provost at University of Ottawa
and former Québec Field Officer at CAUBO's Faculty Bargaining Services

Many readers of *University Manager*, especially those in human resources, are acutely aware that in recent years, “the transition from regular work to full retirement has become more complex” (Hiscott 2013, 59). University faculty and administrators, like other well-educated white-collar workers, are especially likely to consider a post-retirement career. Most have good pensions and a fulfilling life in retirement – many retired faculty members remain active researchers, for example, and both faculty and former senior administrative personnel are likely to find themselves active in some form of volunteer activity – but the lure of continued involvement in part-time work may be strong when people retain their health and their appetite for engagement. In today’s society, retirement is thus best viewed “not as a state, but rather as a transitional process over time” (Hiscott 2013, 59).

My own recent experience with CAUBO’s Faculty Bargaining Services unit exemplifies the fluidity of this phenomenon. As a senior academic administrator, I was familiar with FBS and its valuable work for university administrations, both in preparing for negotiations, and in managing collective agreements for faculty unions and allied groups, including sessional lecturers and other contract academic staff; post-doctoral fellows; and unionized undergraduate/graduate teaching and research assistants. Having benefited from an FBS intensive training session in the techniques of collective bargaining, and having presented at more than one annual FBS conference, I knew that the FBS team was highly motivated, energetic, and expert, but rather less aware that its membership was drawn from the ranks of retired academic and other senior university administrators.

Because FBS is quasi-autonomous – though part of CAUBO, it has its own management



board and operates independently as a fee-based service to Canadian universities – many members of CAUBO may be unaware of its very existence. FBS is nearly half a century younger than CAUBO, having been founded in 2004 at the initiative of Jacques Samson, who was then CAUBO’s Executive Director. Its creation was prompted by the energetic promotion of negotiation services for faculty union bargaining teams by the Canadian Association of University Teachers (CAUT), and by the recognition that university administrations were quickly falling behind in their ability to prepare their bargaining teams for negotiation with faculty unions and in their lack of timely information-sharing. The role of FBS, then and now, has been to provide expert support and advice to university collective bargaining, and, increasingly, to serve as a focal point for cross-Canada networking and knowledge-sharing in this key area.

Despite my previous contacts with FBS and the deep respect I had acquired for those who comprised it, it had never occurred to me that I might find myself one day joining that elite group. Immediately following my retirement, however, I found myself being recruited as a new FBS Field Officer for Quebec. The five FBS field officers, each serving a region or a portion of one, from Atlantic Canada to the western provinces, were extraordinarily welcoming to me, the new kid on the bargaining block, as was long-time Director Sharon Cochran. As I slowly learned the ropes, I marveled at their breadth and depth of knowledge: bargaining theory and practice, labour legislation, human resource management, financial expertise – they knew it all. The combined length of experience they brought to the FBS mission, as a group of retired senior administrators, was truly unparalleled: even the most arcane questions I might pose were apt to bring

forth learned and detailed answers from more than one member of the group. This was especially true when my queries were about how to make the best use of the available resources. FBS maintains a comprehensive database of collective agreements and information on pensions and benefits, in addition to conference presentations, in-depth reports on key issues, and a wealth of other material. The answers to my queries came not just from the other field officers but also from the staff members, whose own expertise I soon came to admire and value deeply.

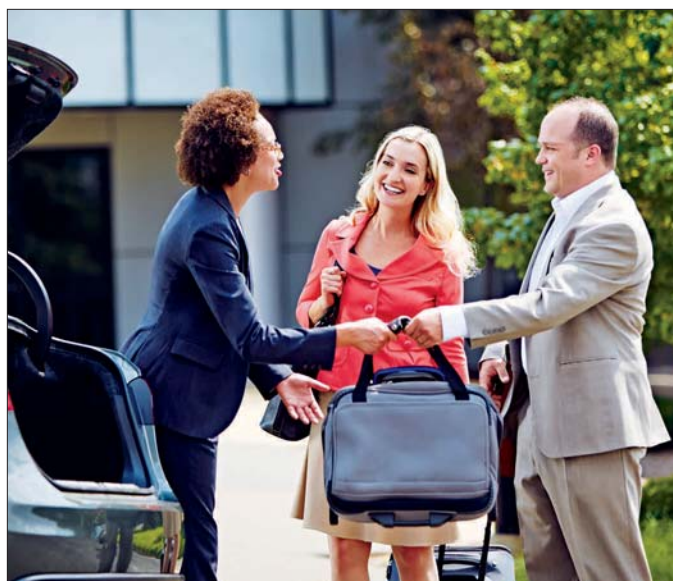
My introductory interview by Sharon and Claude took place by Skype from Kilimanjaro International Airport in Tanzania, where I was undertaking some consulting work. In fact, one of the things I most appreciated about FBS was that being Quebec Field Officer involved a commitment of only one day each week in total. Though daily availability was certainly desirable, I was thus able to continue building up my nascent career in higher education leadership and management consulting, another part-time string to my semi-retired bow.

The life of an FBS Field Officer is seldom dull. Every week brought fresh challenges, as one or another of the universities for which I was responsible alerted me to some new and intricate problem to which FBS might be able to find a solution. In addition to the sheer joy of problem-solving, my contacts with university human resources and academic labour relations specialists afforded me many other pleasures. One activity of particular interest was being able to attend the biannual meetings of the Quebec universities' labour relations working group, where labour relations specialists from across Quebec share information and talk tactics. These meetings were invariably fascinating, in part because they enabled me to meet colleagues from all the Quebec universities (especially in the Université du Québec system), and in part because they span the entire gamut of university labour relations, not just academic unions.

But the real pinnacle of the year, as my predecessor had foretold, was the annual Quebec FBS group meeting. What a treat it was to spend a full day with our members reviewing our collective accomplishments and plans.

Little did I know, however, that the workshop would be my swan song. To my astonishment, a couple of weeks later, I found myself being talked into returning to the work force full-time to take up a two-year appointment as Vice-President Academic and Provost at the University of Ottawa. As I write these words, on a Sunday evening late in April, I am preparing to begin that role in the morning. Retirement is indeed complex and full of unexpected twists and turns! But I will cherish my too-brief stint with FBS forever, and I commend it most warmly to anyone with experience in and an interest in academic labour relations. FBS is one of CAUBO's great achievements, and its importance to Canada's university administrations continues to grow with every day that passes. *YM*

Hiscott, Robert D. "Determinants of Post-Retirement Employment: Canadian Evidence." *The Canadian Journal of Career Development/Revue canadienne de développement de carrière* 12, no. 2 (2013): 59-71.



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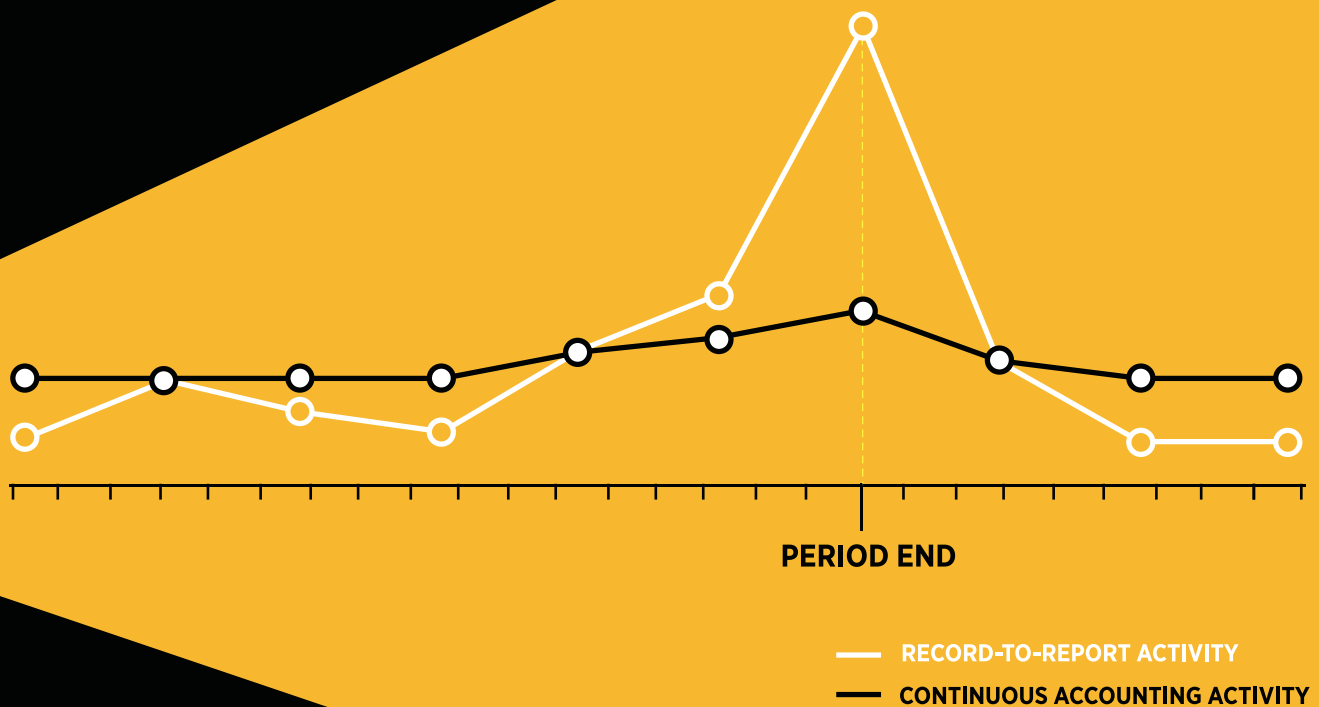
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Travail, plaisir, bonheur :

ma trop brève carrière au sein des Services d'appui à la négociation avec le corps professoral

par David Graham, vice-recteur aux études à l'université d'Ottawa et ancien agent régional pour le Québec aux Services d'appui à la négociation avec le corps professoral de l'ACPAU

Bien des lecteurs de la revue Gestion universitaire, surtout ceux du domaine des ressources humaines, savent très bien que dans les dernières années, « la transition d'un emploi régulier à la retraite complète est devenue plus complexe ». (Hiscott 2013, 59 [traduction libre]) Le corps professoral et les administrateurs d'universités, comme d'autres cols blancs hautement scolarisés, sont particulièrement susceptibles d'envisager une carrière après avoir pris leur retraite. La plupart d'entre eux ont de bons régimes de retraite et une vie pleinement satisfaisante après leur carrière. De nombreux membres du corps professoral retraités poursuivent d'ailleurs leurs activités de recherche, et tant les membres du corps professoral que les anciens cadres administratifs sont susceptibles de s'engager dans une forme ou une autre de bénévolat. Toutefois, l'idée de poursuivre leur travail à temps partiel peut être fort attrayante pour ceux qui ont encore une bonne santé et qui ont soif de s'impliquer. Dans la société d'aujourd'hui, la retraite est le plus souvent perçue « non pas comme un état, mais comme une transition qui s'opère au fil du temps ». (Hiscott 2013, 59 [traduction libre])

Ma propre expérience récente auprès des Services d'appui à la négociation avec le corps professoral (SANCP) de l'ACPAU illustre parfaitement la fluidité de ce phénomène. En tant que gestionnaire universitaire, je connaissais bien les SANCP et le travail précieux qu'ils font pour les administrations universitaires, tant dans la préparation des négociations que dans la gestion des conventions collectives avec les syndicats de professeurs et les associations englobant les chargés de cours à temps partiel et autres professeurs à contrat, les boursiers de recherches postdoctorales ainsi que les assistants à l'enseignement et à la recherche syndiqués de tous les cycles. Ayant suivi une séance de formation intensive des SANCP sur les techniques de négociation collective et ayant présenté des communications à plus d'un congrès



annuel des SANCP, je savais que l'équipe des SANCP était très motivée, énergique et dotée d'une grande expertise, mais j'ignorais qu'elle était formée en grande partie d'universitaires ou de cadres supérieurs à la retraite.

Parce que les SANCP sont quasi autonomes – même s'ils font partie de l'ACPAU, ils ont leur propre conseil de gestion et fonctionnent de manière indépendante en tant que service tarifié –, bien des membres de l'ACPAU ne sont pas au courant de leur existence. Les SANCP ont près d'un demi-siècle de moins que l'ACPAU. Ils ont été fondés en 2004 à l'initiative de Jacques Samson, directeur général de l'ACPAU à l'époque. La promotion vigoureuse par l'Association canadienne des professeurs et professeurs d'université (ACPPU) des services de négociation pour les équipes de négociation des syndicats de professeurs, de même que l'incapacité croissante des administrations universitaires à bien préparer leurs négociations avec les syndicats de professeurs et à partager

l'information pertinente au moment opportun, sont à l'origine de la création des SANCP. Leur rôle était et est toujours de fournir un soutien et des conseils avisés aux universités en matière de négociation collective et, de plus en plus, de servir de plaque tournante au réseautage et au partage de connaissances à l'échelle du Canada dans ce domaine clé.

Malgré mes contacts antérieurs avec les SANCP et le respect profond que j'avais acquis pour les gens qui en faisaient partie, il ne m'était jamais venu à l'esprit que je puisse un jour me joindre à ce groupe d'élite. Toutefois, dès mon départ à la retraite, j'ai été recruté comme agent régional pour le Québec au sein des SANCP. Les cinq agents régionaux desservant chacun une région ou une portion de région, du Canada atlantique aux provinces de l'Ouest, ainsi que la directrice de longue date, Sharon Cochran, ont tous accueilli chaleureusement le « petit nouveau » que j'étais sur la scène des négociations. Pendant que j'apprenais lentement

les ficelles du métier, je m'émerveillais devant l'ampleur et la profondeur de leurs connaissances : théorie et pratique de la négociation, droit du travail, gestion des ressources humaines, expertise financière – rien ne leur échappait. Ensemble, en tant que groupe de cadres administratifs, ils apportaient à la mission des SANCP un nombre d'années d'expérience impressionnant. Même lorsque je leur posais mes questions les plus obscures, plusieurs membres du groupe étaient en mesure de me fournir des réponses réfléchies et détaillées. C'était encore plus vrai lorsque je les interrogeais sur les meilleures façons possible d'utiliser les ressources disponibles. Les SANCP tiennent une base de données exhaustive comprenant des conventions collectives, de l'information sur les régimes de retraite et les avantages sociaux, des présentations faites lors de congrès, des rapports approfondis sur des enjeux importants et une foule d'autres documents. Les réponses à mes questions provenaient non seulement des autres agents régionaux, mais également des membres du personnel dont j'en suis rapidement venu à admirer et apprécier l'expérience.

J'ai fait mon entretien initial avec Sharon et Claude sur Skype, à partir de l'aéroport international du Kilimandjaro en Tanzanie, où je me trouvais en tant que consultant. En fait, l'une des choses qui me plaisaient le plus dans mes fonctions d'agent régional pour le Québec, c'était le fait que je doive consacrer l'équivalent d'une seule journée

par semaine à ce travail. Même s'il était souhaitable que je sois disponible tous les jours, j'ai tout de même pu continuer à développer ma carrière naissante comme consultant à temps partiel en leadership et gestion de l'enseignement supérieur – une autre corde à mon arc de semi-retraité.

La vie d'un agent régional des SANCP est rarement monotone. Chaque semaine, je devais relever de nouveaux défis lorsque l'une ou l'autre des universités dont j'étais responsable portait à mon attention un nouveau problème complexe que les SANCP pouvaient être en mesure de régler. J'étais toujours heureux de m'adonner à la résolution de problème, mais ce n'était pas le seul plaisir que m'apportaient mes interactions avec les spécialistes des ressources humaines et des relations de travail en milieu universitaire. Une activité que je trouvais particulièrement intéressante était la participation aux rencontres semestrielles du groupe d'étude sur les relations de travail des universités québécoises, où des spécialistes de partout au Québec venaient partager de l'information et parler tactique. Je trouvais toujours ces rencontres fascinantes, d'une part parce qu'elles me permettaient de rencontrer des collègues de toutes les universités québécoises (en particulier celles du réseau de l'Université du Québec) et d'autre part parce qu'elles portaient sur l'ensemble des relations de travail dans les universités, pas seulement sur les syndicats universitaires.

Mais, comme me l'avait dit mon prédécesseur, l'événement réellement marquant de l'année était la rencontre de groupe annuelle des SANCP pour le Québec. C'était un réel bonheur de passer une journée entière avec nos membres à revenir sur nos réalisations collectives et nos plans.

J'étais loin de me douter que cet atelier serait mon chant du cygne. À ma grande surprise, quelques semaines plus tard, on m'a convaincu de reprendre le travail à temps plein en acceptant un mandat de deux ans en tant que vice-recteur aux études à l'Université d'Ottawa. Au moment où j'écris ces lignes, un dimanche soir de la fin d'avril, je me prépare à entreprendre mes nouvelles fonctions dès demain matin. La retraite est une aventure complexe et pleine de rebondissements inattendus! Je garderai à jamais des souvenirs chers de mon trop bref passage au sein des SANCP, et je recommande sans hésiter à quiconque possède de l'expérience et un intérêt pour les relations de travail en milieu universitaire de s'y joindre. Les SANCP sont l'une des grandes réalisations de l'ACPAU, et leur importance pour les administrations universitaires du Canada croît un peu plus chaque jour.

Hiscott, Robert D. « Determinants of Post-Retirement Employment: Canadian Evidence » *The Canadian Journal of Career Development/Revue canadienne de développement de carrière* 12, no 2 (2013) : 59-71.

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Defining senior administrative officers at Memorial University: a crucial role in an increasingly complex academic environment

With primary responsibility for the operations and organizational management of faculties and schools, the senior administrative officer (SAO) role at Memorial University has evolved to include a significant and varied list of managerial and leadership responsibilities that support the university's overall mission.

The role has changed rapidly since it was officially created more than five years ago, and notable differences exist between the roles, depending on the academic unit. Despite the differences, one constant remains – the SAO is crucial to the administrative leadership success and effective operation of academic units at Memorial.

Until the early 1990s, executive assistants provided comprehensive tactical support to deans in all areas of academic administration, including finance, human resource management, budget management and academic staff support. Later, Memorial shifted away from its traditionally centralized model to a more decentralized system, giving academic units more responsibility for enrolment management and budgeting. Deans in the units then expressed a need to focus less on academic administration and more on strategic academic planning, which resulted in the creation of the manager of finance and administration role. In 2006, this manager role in the academic units was evaluated and officially replaced with the senior administrative officer position in 2011.

In today's global, digital and multifaceted post-secondary environment, the SAO role is an important element of the leadership teams in Memorial's academic units. SAOs must possess a broad and deep level of knowledge in the functional areas required to successfully do the job; including academic management support, finance, human resource management, information management and facilities management; they must have a clear and in-depth understanding of the academic environment; and, as they are senior advisors to the deans with significant authority, they must hold exceptional leadership skills.

SAOs at Memorial connect the administrative and academic functions in the faculties and schools they support; delicately balancing strategy, goals and objectives with the university's policies, procedures and protocols.

Recognizing the increasing responsibility and complexity of the role, a team of relevant internal stakeholders at Memorial, comprised of human resources staff, deans and representatives from the SAO group set out to analyze and evaluate the position, with the goal of creating a comprehensive leadership profile, including the leadership competencies of the SAO role, and the valuable skills, abilities, behaviours, attitudes and functional knowledge areas necessary for success.

Working in collaboration with staff in the Office of the Provost and Vice-President (Academic) and the Department of Human Resources, the SAO Training and Development Committee was mandated to: assess changes in the role requirements and duties from the original SAO position; and to provide advice, feedback and guidance for the creation and implementation of an SAO learning and development plan, including competencies, initiatives, training opportunities and programs.

"While it is widely recognized that the success of academic units requires strong academic leadership from its deans, a unit's administrative leadership from its SAOs is equally important in supporting the dean's vision and achieving the goals and objectives for the unit," said Roxanne Millan, Director of Academic Support Services in Memorial's Office of the Provost and Vice-President (Academic). "The provost's office recognized the importance of nurturing this dual leadership several years ago when a group of deans proposed that administrative leadership for academic units be recognized more formally. Therefore, we embraced the partnership with Human Resources to take things a step further to identify core competencies for SAOs."

The group consulted widely with individuals and units across the university that commonly intersect with the SAO role, and reviewed literature on leadership and competency development from other universities and outside organizations, which culminated in the development of the Senior Administrative Officer Competency Model and a set of recommendations to realize the learning and development goals for this important employee group at Memorial.

"SAOs bridge the gap between the administrative and academic functions in faculties and schools, with a breadth and depth of responsibility unlike any other position," said Heather Stamp-Nunes, chair of the Senior Administrative Officer Training and Development Committee and Manager of Learning and Development at Memorial.

"We knew going into this project that the learning and development goals for the SAO role and the outcomes of this project would need to be considered in the context of the unique role each SAO plays within the areas they support. The individuals in the roles collaborate regularly with faculty, staff, researchers, and other members of their leadership teams, as well as other portfolios across the university, and a variety of external stakeholders, including unions, contractors, among others, depending on the unit. We knew how important it would be to ensure we came up with a useful, but flexible, plan and model that could be tailored to the distinctive needs of each SAO position and each unit."

THE COMPETENCY MODEL

Based on feedback from the consultations, the committee developed a dynamic SAO competency model that reflects the complexity of the leadership position. Leadership, with its associated competencies, sits at the core of the model, intersecting with functional competencies within a dynamic post-secondary academic environment. It is important to note that each academic unit at Memorial has unique characteristics that may require a slightly different balance of functional competencies outlined in the model.

Extensive consultation and dialogue led to the identification of the competencies outlined in the SAO Competency Model (Figure 1).

A competency can be defined as the capability to apply or use a set of related knowledge, skills, and abilities required to successfully perform critical work functions or tasks in a defined work setting. In addition to functional competencies, which are job specific and generally well understood and easier to identify, the committee explored how behavioural competencies that reflect the personal attributes, attitudes and values that an individual brings to a role contribute to successful outcomes.

The SAO Competency Model stresses the centrality of leadership at the core of SAO competency. The SAO is considered to be a leader within the academic unit, reporting to the dean and collaborating closely with other members of the leadership team, as well as faculty and staff at all levels. As an administrative leader accountable to the dean and responsible for ensuring the smooth operation of the administrative functions of the unit, the position is conceptualized as more than an administrator. The SAO leads change through a broad array of personal characteristics, knowledge and skills to influence organizational change.

Several crucial leadership skills surround the core. These include communications skills, both oral and written, and including relationship building, conflict resolution, persuasion and negotiation; knowledge of the principles of strategic management; change management skills; consulting skills, including research and analysis; and project management skills.

SAO Competency Model

Post-Secondary Academic Environment



Figure 1.

Functional responsibilities relate to knowledge of the main functional areas of the university: academic management support, finance, human resource management, information management, and facilities management. In the model, academic management support, human resource management and finance are highlighted due to their significance. The “unit specific” functional competency refers to other specific areas of expertise that may be particular to one unit (e.g., marketing, development, community- or industry-specific knowledge). Unlike the leadership skills, there is variety among the SAO positions with respect to the breadth and depth of



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functional competency requirements. For instance, in one unit an SAO may have some responsibility for marketing and would be expected to have an understanding of marketing principles, though this knowledge is not critical to success in the SAO role. This dynamic is presented as a band around the leadership skills with the relative importance of different functional areas varying from unit to unit.

Additional components of the SAO Competency Model reflect an understanding that successful administrative leadership within an academic unit requires an in-depth understanding of the academic environment, within and outside Memorial University, and that no two SAO roles are identical. As such, the model is dynamic and job design may vary.

To support customization and adaptation of the model for the university's SAO roles, a SAO Competency Development Guide was also developed. The guide provides examples of how the model can be applied in each unit in relation to the functional and behavioural leadership competencies illustrated in the model with each competency contextualized in four areas: core skills and knowledge;

intersection with academic environment; interconnection with leadership and key stakeholders (internal and external). The guide gives practical guidance to SAOs on specific areas of competency identification and development as they perform self-assessments and build a learning and development plan with their deans.

The work of the committee and the resulting SAO Competency Model and Competency Development Guide has equipped Memorial with the tools needed to create a basic roadmap of learning and development opportunities for SAOs at various levels in their careers.

The resulting learning plan is designed to give practical guidance to SAOs on specific areas of competency identification and development as they perform self-assessments and begin to build learning and development plans with their deans.

"Through this process, we are now able to identify functional areas requiring further development for the SAO position, as the administration landscape continues to evolve for academic units," said Stephen Dodge, director of the Department of Human Resources. "We are much better positioned to respond to those changes and are really

establishing the conditions for success for our deans and their faculties and schools."

Going forward, the goal of this professional development plan is to ensure that all SAOs have equal access to development training that addresses gaps, supports individual needs, prepares them for future challenges and provides institutional leadership for continuity and efficiency.

Engaged and motivated to continue to support the invaluable SAO role, the SAO Training and Development Committee, with the support of the provost's office, human resources team, and other university stakeholders, is now focusing on oversight and implementation, including a focus in the areas of customized learning and development strategies; SAO recruitment, onboarding and retention; formal job design and evaluation; and performance development.

The SAO Competency Model and Competency Development Guide are tools which are customizable and can provide a strong foundation for other institutions, including yours, to build on. Additional information can be found by visiting <https://www.mun.ca/hr/>. 

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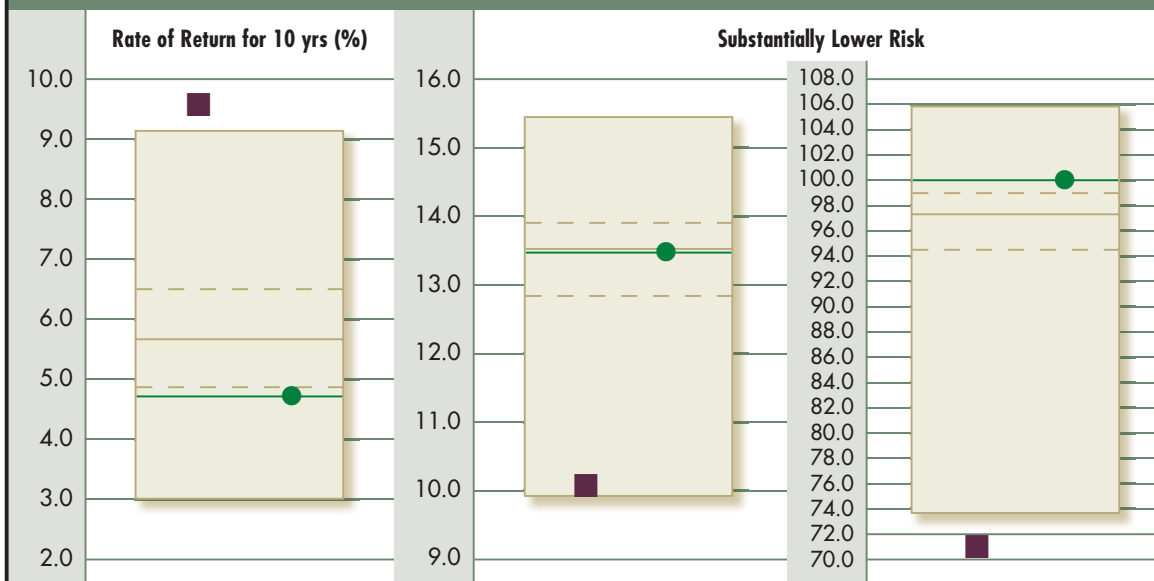


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People *Moves*

Appointments

Michael Benarroch has been appointed Provost at Ryerson University. Benarroch currently serves as Dean of the Asper School of Business at the University of Manitoba.

Valerie Henitiuk has been appointed Vice-President Academic and Provost at Concordia University of Edmonton. Henitiuk previously served as Executive Director of the Centre for the Advancement of Faculty Excellence at MacEwan University.

Jackie Hogan has been appointed Interim President of the University of the Fraser Valley. Hogan currently serves as Chief Financial Officer and Vice-President Administration at UFV.

Donna Kotsopoulos has been appointed Provost and Dean of the Faculty of Arts and Social Science at Huron University College. Kotsopoulos currently serves as a Professor and Associate Dean in the Faculty of Education, cross-appointed to the Department of Mathematics in the Faculty of Science at Wilfrid Laurier University.

Peter Ricketts has been appointed President of Acadia University. Ricketts currently serves as Provost and Vice-President (Academic) at Carleton University.

Retirements

Gary Brewer, Vice-President Finance & Administration at York University, has retired as of April 2017. After initially serving as Director of Budgets and Planning, and then Assistant Vice-President Finance and CFO, he was appointed to his most recent role in April 2002. Gary has been an active member of CAUBO for 10 years, participating on the Quality and Productivity Award Committee, as well as in a number of leadership roles on its Board of Directors. 



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