

# Finance and Administration Coffee Hour

March 11, 2025

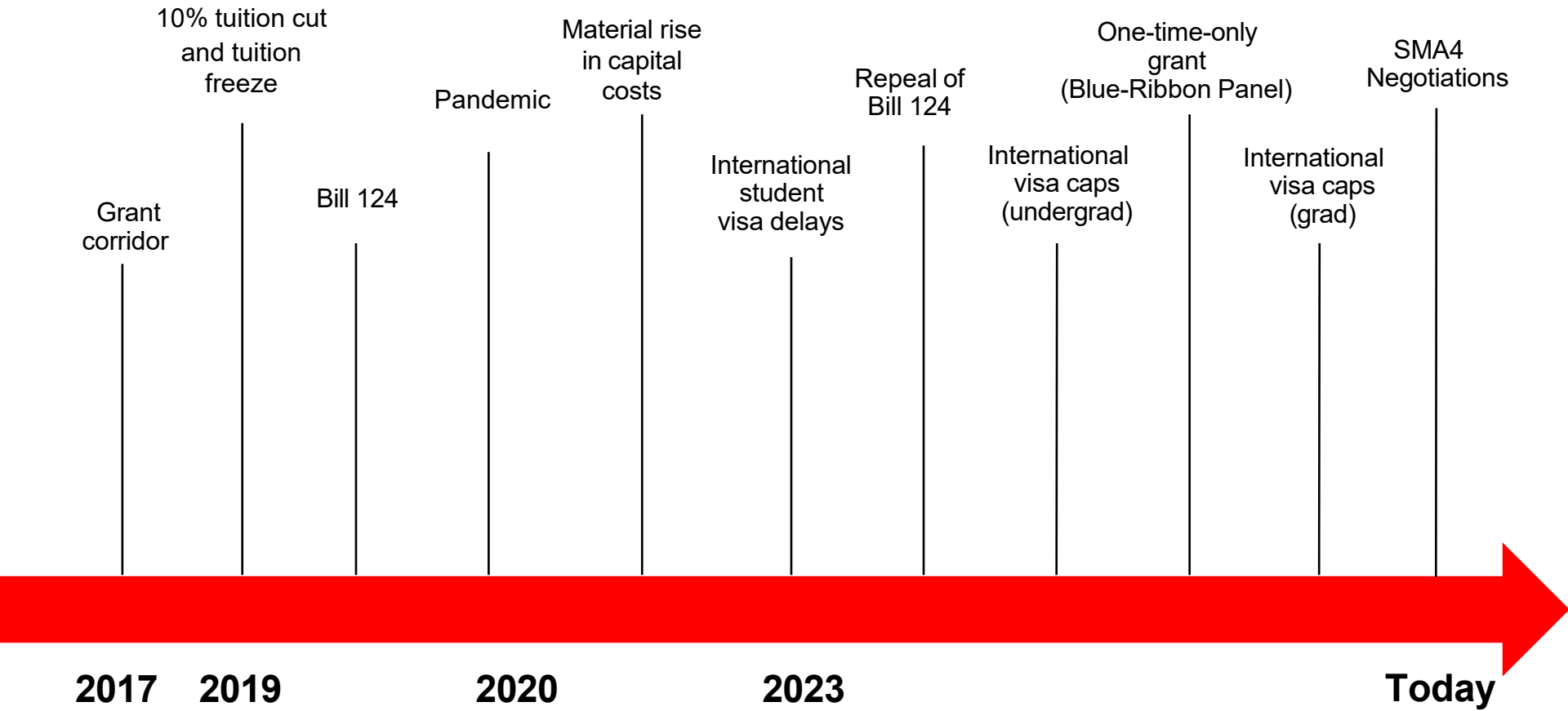
# Welcome and Opening Remarks

# Agenda

1. Update on Carleton Budget and F&A Perspective
2. Capital Projects
3. F&A Strategy Impact Groups (SIGs) Updates
4. Questions

# **Update on Carleton Budget and F&A Perspective**

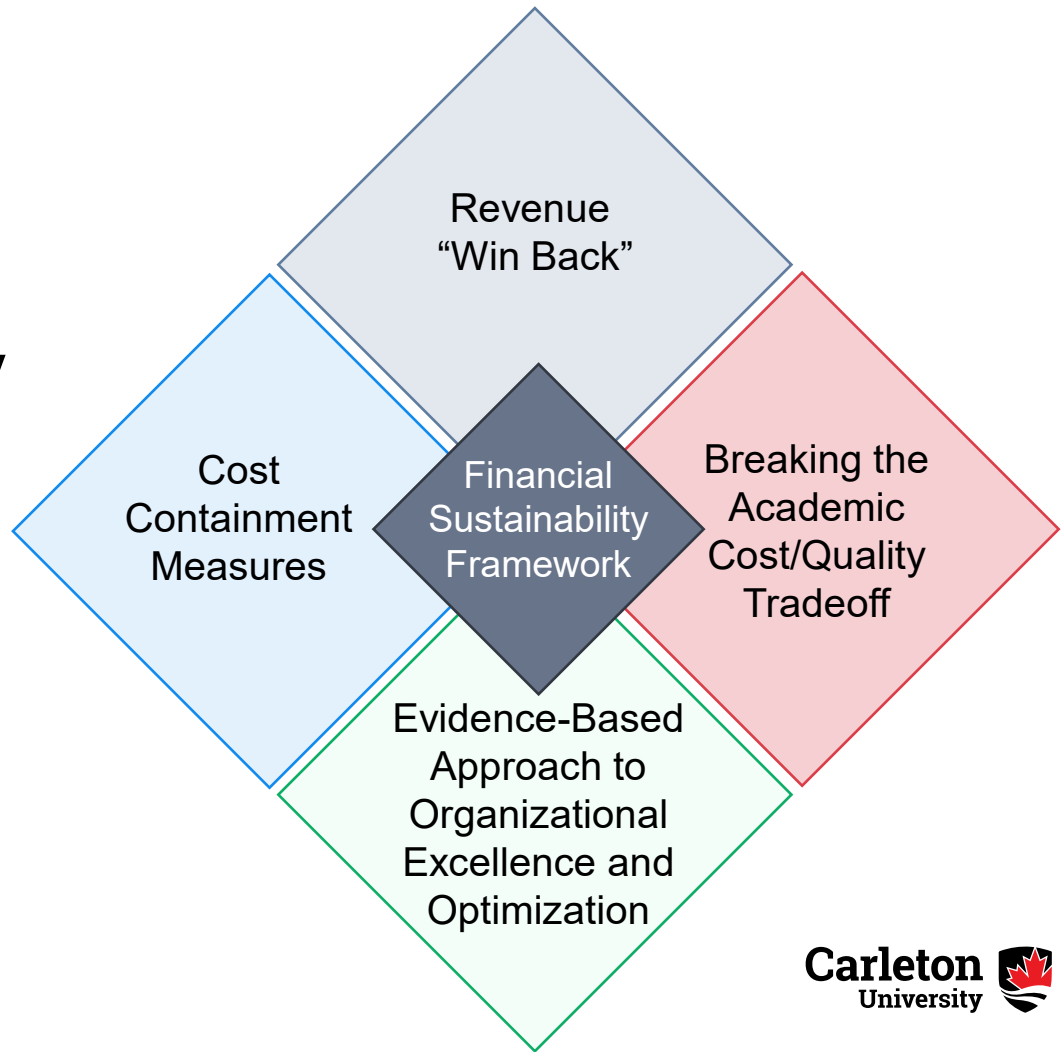
# Environmental Change Impacting Higher Ed



# Summary of Blue Ribbon Panel on Post-Secondary Education Financial Sustainability

<u>Recommendations</u>	<u>Government Action Taken to Date</u>
<ul style="list-style-type: none"><li>• A one-time increase of 10% in per student grant funding applied in 2024-2025</li><li>• Subsequent increases equal to the consumer price index or 2%, whichever is greater;</li></ul>	<p>Received a one-time grant of \$7.2 million to account for previously unfunded growth in the STEM disciplines in 2023-24.</p> <p>The Province has announced an additional increase in the operating grant between 2024-25 and 2026-27. It is anticipated that this increase will fall short of the panel's recommendation.</p>
<ul style="list-style-type: none"><li>• Review the Ontario Student Assistance Program (OSAP) assessment processes and policies to increase grants for low-income students</li></ul>	<p>No action</p>
<ul style="list-style-type: none"><li>• Confirm a multi-year tuition framework:<ul style="list-style-type: none"><li>• 5% increase starting in 2024-2025</li><li>• Subsequent increases equal to consumer price index or 2%, whichever is greater;</li><li>• An additional increase of 3% for professional programs.</li></ul></li></ul>	<p>Announced continued tuition fee freeze for 2024-25 through to 2026-27.</p>
<ul style="list-style-type: none"><li>• Consider increasing funding levels for deferred maintenance</li></ul>	<p>No action</p>

# Financial Sustainability Framework



# Guiding Principles

- ✓ The goal is financial sustainability;
- ✓ Short-term solutions create long-term problems;
- ✓ Cuts cannot be the sole solution; we need to encourage revenue growth;
- ✓ Intentional about the mix of programs the university offers;
- ✓ Integrate financial, academic and service goals in assessing programs and activities.



# The F&A Perspective

- 22% of overall Voluntary Retirements are within F&A
- A Position Review Committee has been established
- Not all positions will be filled – only critical roles
- Capital planning process review
- New programs to generate revenue

# Capital Projects

# P9

- Demolition of the parking garage is complete
- First time a building has been taken down on Carleton's campus
- Project on track to come in under budget by \$4.5 million
- The site will be landscaped in the spring

# New Student Residence

- Rideau House – 456 beds for first-year students
- Final phase of construction with a June occupancy
- The project team has been working closely with Housing and Suzanne Blanchard's office
- Due to staffing changes, we have brought Colliers to support

# Loeb

- The exterior of Loeb is at end-of-life and requires remediation
- Project will address safety concerns
- Lobby area will be renovated – funding from Faculty of Public and Global Affairs
- New project governance model will be implemented for this project, including a steering committee, and stakeholder engagement and communications plan.
- Expected project start date is August/early September

# Strategic Impact Groups Update

# Promoting a Digital Mindset

Executive Sponsor(s)	Department
Valerie Turner	ITS

Member	Department
Joseph Nelson	ITS
Chris Moy	CSS
Terrence Odin	HR
Angela Winder	PFM
Ben Schmidt	ITS
Natalie Kahalé	ITS



# Promoting a Digital Mindset Objectives:

This SIG aims to foster and promote a digital mindset by focusing on three levels of digital literacy.

At the **foundational level**, this SIG seeks to understand the gap between the potential of Microsoft tools, which Carleton has already invested in, and their actual use/uptake. The SIG then aims to close this gap by enhancing F&A's knowledge, comfort, and use of these tools.

At the **mid-level**, this SIG aims to develop some best practices around key processes and tools to support consistency, efficiency, and effectiveness across F&A teams and departments.

At the **more advanced level**, this SIG aims to pilot the use of artificial intelligence (Co-Pilot) among a defined group and task to capture and share the challenges, opportunities, and potential impact.



# Updates:

- Digital Mindset questionnaire
- ITS training on Copilot
- Copilot Use Cases – training, support
- Lunch and Learns - Intro to Copilot and Planner and others

# F&A Front Door

Executive Sponsor	Department
Brian Billings	CSS

Partner with  
Stakeholders

Pursue Excellence  
in the Everyday

Member	Department
Cindy Taylor	HR
Richard Sabourin	CSS
Nancy Delcellier	ORM

Member	Department
Steve Sweeney	ITS
Scott Macdonald	FMP
Maria McClintock	OVP (F&A)
Kevin Mann	FS

# Objectives

This SIG aims to **enhance efficiency** by reducing the volume of mis-directed inquiries and the time or steps it takes to direct them to the right team/department. By reducing inefficiencies, this SIG also aims to enhance F&A customer/client satisfaction.

## The SIG will:

- Understand the volume / impact of this issue
- Identify common questions / issues to be addressed in phase one
- Create a web-based tool/page that can better direct faculty and staff to the appropriate team for the key questions/issues identified
- Identify ways to assess, improve and expand upon this pilot

# Update:

- Learning from the City's 311 system
- Identified top “misdirected inquiries” coming to F&A departments
- Connected with Info Carleton to ensure alignment and support
- Exploring Copilot and the use of "chat bots" and their potential to direct inquiries

# Software Rationalization

Executive Sponsor	Department
Peter Leland	ORM

Member	Department
Naz Ahmed	PFM
Erin Chezick	FS
Chris Cline	ITS
Bruce Clemmer	ITS
Steve Fraser	ITS
Daniel Redmond	FMP
Janet Hanna	FMP

Partner with  
Stakeholders

Pursue Excellence  
in the Everyday

Embed  
Environmental,  
Social and  
Governance  
(ESG) Principles



# Objectives

SIG Software Rationalization will review application inventory and make recommendations on which applications should be retired, retained or consolidated.

- Assess current state:
- Build transitional state and collect information:

## Long Term

- Review transitional processes used to collect, present and store software information.
- Collaborate with key stakeholders to create and promote a standard process for software requests, procurement, license management and reporting.

# Update:

- Scan of university-level data of “software” and software-related categories from eShop, Concur and Pcard
- Question within Digital Mindset survey re: non-Microsoft Tools
- Developing a presentation about findings, risks, and next steps
- Recommendations for policy change

# Space Management

Executive Sponsor	Department
Andrew Urquhart	PFM

Member	Department
Angela Marcotte	FS
Chad Thomison	ORM
Leanne Wilson	FMP
Philip Mansfield	FMP
Michael Monreal	FMP



Member	Department
Laura Wilson	FS
Peter Cech	ORM
Steve Fraser	ITS
Naomi Telfort	ITS





# Objectives

- Assess and map F&A's current space usage across campus
- Assess and map space usage and opportunities within PK
- Draft proposal for how to rationalize F&A's total space within PK and develop a functional program to support different needs and functions such as a conversion of existing space to suit the needs of FOS
- Understand the financial implications of these changes and develop a budget to support the change in use

# Updates:

- Pigiarnvik Space Utilization Study
- PK – F&A Leaders Space Questionnaire - TBD

# Questions

**Carleton**  
University

