Operations & Real Estate Annual Report 2022

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Operations and Real Estate Partnerships is a diverse and ubiquitous portfolio usually comprised of 1,800 FTEs, spread functionally over 7 OREP units.

We strive to make operations: smarter; better; faster
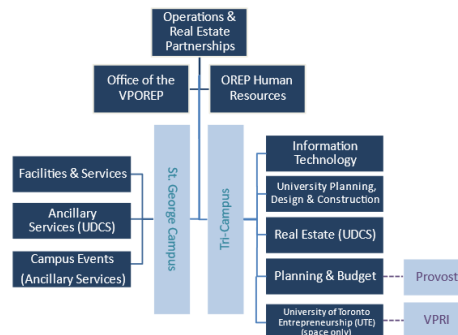
Presented to:
Business Board
June 20, 2023

We strive to **provide services efficiently and effectively, freeing up resources to fulfill the university's mission** of knowledge creation, educational program delivery and community service.

We are **tri-campus in focus and facilitation** and we **pursue new initiatives**, abiding by the following missions:

- **drive change by improving operational efficiency**, thus freeing up resources for the classroom or by bringing new ideas to the table;
- **anticipate institutional challenges/risks** and work collaboratively with colleagues to address and mitigate these risks;
- **increase revenue sources** to reduce reliance on student enrolment; and
- collaborate with shared service colleagues to **improve the functioning and effectiveness of "institutional services"** for the broader academy.

Supporting Our Institutional Priorities

Leverage our locations: See: University Planning and 4C reports

Re-examine and reinvent (undergraduate) education: Facilities & Services (F&S):
F&S is committed to directly contributing to the university's academic mission by actively supporting research and learning. In 2022-23 F&S:

- **employed 15 University of Toronto students and recent graduates through the Work Study and OREP Professional Experience programs**.
- **contributed $225,000 in funding for five climate change and energy focused projects through the university's Climate Positive Energy initiative.** This provided over 200 students with the opportunity to participate in projects focused on renewable energy, energy efficiency, health and well-being, and emissions accounting.
- **created three new roles for UofT Professional Experience Year (PEY) engineering students**.
- **supported student development by actively participating in courses and practicums**.
- **helped the student start up Solv4x within the Rotman School of Management's Creative Destruction Lab test out an innovative new application**, which aims to reduce costs and use the lowest carbon emission sources when charging electric vehicles.

OREP Annual Reports to Governance Bodies

Audit Committee: Information Security and the Protection of Digital Assets
Business Board: Capital Projects and Real Estate Annual Review to December 31, 2022
      Spaces & Experiences: Annual Report 2022-23 and Budget 2023-24
      4 Corners Annual Report 2022-23
      Deferred Maintenance Annual Report 2022
Governing Council: Committee on the Environment, Climate Change, Sustainability (CECCS)
Planning & Budget: Budget Report 2023-24 and the Long-Range Budget Guidelines 2023-24 to 2027-28
      Executive Committee of the Capital Project and Space Allocation Committee (CaPS)
      Design Review Committee, 2022
      Information Security and the Protection of Digital Assets

Facilities & Services

Operational highlights in numbers

Operational highlights F&S has made significant strides in preparing to sustainably support the future growth of the campus while continuing routine, round-the-clock maintenance, and successfully delivering on client and capital projects. Our operational highlights from fiscal year 2022-2023 include:

- 52,088 new service orders created for F&S
- 48,603 facilities and campus safety related calls answered by the call centre
- 1,503 service alerts issued about planned maintenance, projects, shutdowns, and disruptions on campus
- 475 client and infrastructure projects under management by property management
- 15,168 of electrical equipment scanned for safety
- 81% completion rate of monthly building inspections
- 700+ electrical requests for service submitted
- $840,000 provided towards proactive asbestos abatement projects
- 18,881 e-newsletter opens by readers
- 300,000+ social media impressions made via Sustainability Office channels

Progress on our strategic priorities

GREAT PLACE TO WORK
Invest in people, invest in teams, invest in success.

LEADERSHIP IN CAMPUS STEWARDSHIP
Expert asset management, aligned for growth of our community.

SUPERIOR CUSTOMER SOLUTIONS
Excellent client experiences, trusted partners.

INNOVATIVE TECHNOLOGY
Greater efficiency, sound decisions, effective communication.

IMPACTFUL SUSTAINABILITY
Design for people, exceed our climate change commitments, create for lasting impact.

The 2019-24 F&S strategic plan is centered around advancing customer-centric service delivery; improving staff experience and engagement; extracting greater value from our physical assets; and making significant strides in sustainability. In 2022-23, considerable progress was made on the five strategic goals and objectives set last year towards achieving the F&S strategic priorities:

Great place to work

- F&S Innovation Challenge engaged staff and solicited 60+ different ideas to advance our strategic priorities.
- Continued to make progress on equity, diversity, and inclusion (EDI) within Campus Safety.

Leadership in campus stewardship

- Developed and published the university's first tri-campus Facility Accessibility Design Standard.
- Conducted 45+ accessibility design and site reviews for capital projects and advanced three key accessibility projects: an accessibility ramp at Wallberg Building, an accessibility ramp and accessible washroom at 121 St. George Street, and an elevator feasibility study at Canadiana Gallery.

- Onboarded a senior manager of project delivery and began building a dedicated centralized F&S team to increase effectiveness of project delivery.
- Developed a sustainable, simplified roofing design standard built to achieve asset durability and longevity.

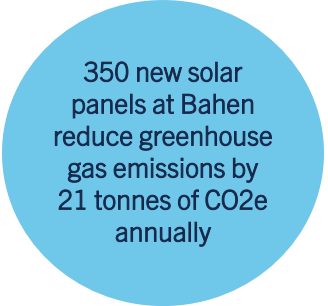### Superior customer solutions

- Completed user experience research of our service request platform—collecting feedback from 170 participants through surveys, interviews, and usability studies.
- Have continued to implement recommendations from the Provostial report "The Role of Campus Safety in Responding to Students in Mental Health Crises.
- Grew commercial property management portfolio to prepare for occupancy of the Schwartz Reisman Innovation Centre and better support commercial clients.
- In partnership with central Procurement, participated in the Social Procurement Pilot Program, which supports diverse suppliers in gaining experience and growing their client base.
- Improved timeliness and effectiveness of communication within caretaking team as well as access to institutional and educational resources for caretaking staff
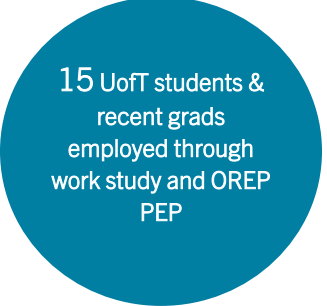
Innovative technology

- Implemented an enterprise SAP-based asset and maintenance management system and mobile application for field staff in partnership with Enterprise Applications and Solutions Integration (EASI).
- Completed enhancements to the F&S Timekeeper application that is used by most F&S staff.
- Piloted and expanded the use of enterprise Microsoft tools to streamline and automate administrative tasks and improve document and project tracking.
- Upgraded the electronic Request for Electrical Services application used to manage electrical project requests to process higher volumes more efficiently and effectively.
- Actively supported all significant enterprise IT priorities and projects.
- Smooth implementation to a new waste manifesting system at UofT's 42 hazardous waste generator sites.

Impactful sustainability

- Leveraging CIB financing, launched the design and secured project financing for Project Leap.
- Doubled our solar energy generation on campus two years ahead of schedule.
- Launched a tri-campus air travel emissions mitigation initiative (ATEMI).
- Consulted on 71 capital projects to ensure they meet our tri-campus energy and greenhouse gas standard.
- Replaced 737 air conditioning units at the Chestnut Residence and Conference Centre with energy efficient heat pumps.
- Raised our waste diversion rate on the St. George campus from 63% in 2020 to 70.6% in 2022—exceeding the target of 60% set by the Ministry of the Environment, Conservation, and Parks.
- Launched the Sustainable Change Programs and awarded over 100 sustainable certifications across residences, events, offices, courses, and labs on campus.
- Engaged the university community with over 300,000 social media impressions on various sustainability topics, projects, and programs.
- Created opportunities for sustainable student action.
- Supported the implementation of the innovative Purolator pilot initiative on campus.
- Made headway on the electrification of F&S' vehicle fleet and equipment
- Secured $5.7M in federal funding towards sustainable infrastructure projects through the Decarbonization Incentive Program.

350 new solar panels at Bahen reduce greenhouse gas emissions by 21 tonnes of CO_2e annually

15 UofT students & recent grads employed through work study and OREP PEP

70.6% waste diversion rate 2022 (63% in 2020)

Information Technology Services (ITS)

The last year focused on coming out of the pandemic and resurfacing projects that had been slowed down or put on hold. ITS leveraged the significant digital transformations that were driven by the pandemic and built on this momentum. We enhanced support for post- pandemic hybrid work and learning, including leveraging existing investments by building in more cross system integrations between core system such as Quercus and Microsoft365. We ramped up enhancement to the Academic Toolbox to meet the changing needs of hybrid learning and initiated a new governance structure for IT@UofT. IT governance is a means to ensure effective and efficient use of institutional resources and capabilities in order to meet the goals of the University and enhance ITS' ability to set priorities, maintaining a strong focus on the academic mission. Through extensive community consultation we created two new Boards that will be fed by the already existing, extensive group of advisory committees. The Business Board, comprised primarily of CAOs, will oversee the portfolio of services and ensure they are meeting the needs of their community. The IT Board, comprised of VPs, Deans and Principals, will determine the priorities based on overall institutional goals. This will create agility, awareness, transparency, and inclusiveness in our decision making.

Information security continues to be a big focus with increased threats from remote work, organized crime and nation states. After extensive consultation and engagement, the team has developed a strong, multi-year plan that requires a collaborative approach across the tri-campus community. Significantly decreased risks by achieving 100 per cent multi-factor authentication (MFA) participation across main groups of appointed staff, faculty and students. The Data Asset Inventory and Unit Information Risk Self-Assessment (DAI-IRSA) was matured and expanded to give divisions a better sense of their gaps and raising awareness and assigns accountability. Provided leadership on provincial and national partnerships, such as CanSSOC, and had the Chief Information Security Officer (CISO) participate on the Broader Public Sector Experts Cyber Security Panel.

ITS completed, or initiated, its major goals for the year. Continued to provide leadership, along with the Library and VPRI, to support enhancements to the University's digital research infrastructure. In partnership with UofT Libraries we have started our tri-campus service desk external review, designed to enhance process and respond to UniForum Service Excellence Survey findings. We have started the migration of units and individuals to Teams voice (telephony) to enhance the user experience and drive savings to the divisions. In partnership with People, Strategy, Equity and Culture (PSEC) we have planned and started the modernization of our core HR systems, designed to streamline process. We also started enhancements to the financial systems, such as electronic funds transfer. In addition.

In partnership with the Faculty of Arts and Science, The Faculty of Kinesiology and Physical Education (KPE) and the Provost's Office we completed phase 1 of a customer relationship management system, related to student advising, which will transform business processes and significantly improve faculty, staff and student experience. Together with Centre for Teaching Support and Innovation (CTSI), Vice Provost, Innovations in Undergraduate Education (VPIUE) and Institutional Research and Data Governance (IRDG) we have built out the underlying infrastructure for learning analytics which will drive better decisions.

The last year also saw significant unplanned activities. Section 889 showed how vulnerable the University is to nation states threats and changing regulations from funders in partner countries.

Planning & Budget

Institutional Data Strategy (IDS): Continued to roll out the IDS, including implementation of high priority data initiatives to expand capacity and maturity of our institutional analytics practice:

- Launched a formal data catalogue and data management guidelines to evolve **metadata management practices and data stewardship of institutional data.**
- Implemented **Tableau Server operational model review** to optimize its current performance; initiated data migration efforts the **cloud-based data and analytics (D&A) platform** to improve our ability to securely store data while better enabling access and sharing across the institution.
- Implemented the **2022 Community Empowerment plan** for data analysts to promote a culture of good data governance, including the launch of a **SharePoint site (UData) for data analysts** and planning of the institution's inaugural **Data Summit**
- Operated and maintained **institution-wide data marts**, including implementing routine updates and process improvements to support University operational and strategic decision-making
- Assessed **institutional data request intake and access approval processes** across academic and shared services units to recommend institutional approaches, roles, and responsibilities.
- To **improve transparency and foster student trust**, developed a student-facing website regarding data collection, use and access.
- Worked with IDS Steering Committee and Councils to update the **Data Governance principles** and established a **Responsible Use of Student Data framework.**

Budget Processes and Structures

- Worked with stakeholders across all divisions to **prepare a balanced budget plan for 2023-24** that reflects constraints on revenue generation and inflationary pressures on expenses.
- Worked with the Vice-Provost Strategic Enrolment Management to develop and implement **changes to the UTAPS bursary program** to make it more responsive to student financial need and less reliant on OSAP assessments. Rollout of new program to start in Fall 2023.
- Developed a framework for **inter-divisional contributions to doctoral program funding** costs.
- Supported the **implementation of differentiated tuition fees** for domestic out of Province undergraduate students.
- Implemented **recommendations coming out of the May 2022 Deans retreat** on allocation of strategic priority funds arising from pension savings. 50% of savings allocated to divisional budgets and 50% allocated to a new Strategic Priorities Fund.
- Supported Year 3 of the **UniForum data collection** through provision of information on scaling factors and revenue categorization. Integrated UniForum data into the University's planning processes.

Reporting & Analytics

- Collaborated with the Provost portfolio on the **development and support of tools/dashboards** including the Student Academic Success initiative and developed a new **budget overview dashboard** for use by senior leaders.
- Collaborated with the Provost portfolio to develop a proposal on the **SMA3 Skills & Competencies metric** which was accepted by the Provincial Government.
- Undertook a **review of public reports** (e.g. Facts & Figures, Long PI Report) to identify opportunities for improvement in terms of metric selection, reporting and usability

Training, community engagement, and communication

- Worked with the Residences Working Group on **residence bed projections** to inform a long-term plan on residence needs.
- **Refreshed the annual budget presentation materials** and expanded content on risk and priority investments to reflect the current planning environment.

Spaces & Experiences (S&E)

A New Name — a New Beginning.

In June 2020, Business Board approved the amalgamation of Ancillary Services with Real Estate Partnerships to create a new portfolio with an expanded mandate in support of students, faculty and staff at the St. George campus. Initially referred to as University Development and Campus Services (UDCS) - with the implementation of the 4Corners real estate strategy and the planned expansion of new student residence communities, family housing and collaborative event, food and innovation spaces — a new name was required to accurately reflect the depth, breadth, and widespread impact of the portfolio on the St. George campus.

With this, the newly amalgamated portfolio previously known as Ancillary Services/Real Estate and/or UDCS became housed under one umbrella within the VPOREP portfolio called: **Spaces & Experiences** (S&E). This change took place in December 2022 with a new website and a full-scale launch event to celebrate this important milestone in the evolution of the portfolio. The name aptly describes what the portfolio creates and provides for the university community and does an improved job of conveying what is curated, developed, and marketed to the St. George campus and stakeholders - both internal and external.

Strategic Planning The establishment of S&E marks the successful conclusion of a 5-year plan developed by Ancillary Services in 2018, the key deliverables of which were to strengthen the visibility of the portfolio and establish a platform for the support of the 4Corners strategy. With the establishment of the new name, identity, and positioning, it was necessary to review and expand upon the previous strategic planning work and to reflect the new portfolio scope. Following two full day working sessions with key managers and directors in the portfolio, and further refinement through targeted focus groups, S&E established four essential strategic pillars from which to grow. Over the next few months, more work will be done with the portfolio senior management group and shared with the full team. An implementation plan will be developed over the following 6-8 months with pertinent metrics established to measure the portfolio's successes and areas for continued review and refinement. Future annual reports to Business Board will review the progress of the strategic plan.

University Planning, Design & Construction (UPDC)

- To deliver over $5B in design and construction work over the next 5 years, **restructured Project Development (PD) and Project Management (PM)**
- To diversify construction partners and increase competition to deliver our large portfolio of projects, **led a construction industry outreach campaign**
- **Established Weekly Flash Reports** to increase open project communication with clients.
- Developed **new and improved Construction Management RFPs** that clearly emphasize expectations and provide insights into the construction industry.
- To elevate the design practice and reduce design coordination errors on projects, **established the Building Information Modeling (BIM) Committee**

Project Management
- **Increased PM staff count by 32% (8)** to deliver >130 active projects.
- **Evolved the construction contracting strategy** from stipulated sum contracts to construction management
- Commenced a **streamlining** of department processes, procedures, and approvals.

Design & Engineering
- **Refocused on our core business** of designing projects in the $1M to $5M construction value.
- To service existing and new client requests recruited 6 architects, engineers, and technologists.
- Completed Building Information Modelling (BIM) training and commenced D&E's shift from CAD to BIM.

Project Development & Controls
- To improve consistency and service levels, **centralized a newly created Project Controls team** comprising procurement, permitting, document control and the future cost estimating and scheduling practices.
- To explore more successful means of delivering mega-projects, **led the roll-out of the University's first IPD contracting model** on the Temerty Faculty of Medicine's redevelopment.

University Planning
Master Planning / Planning Policy / Municipal Planning Legal
- Major milestone reached following a multi-year process starting in 2015 towards a new St. George Campus Secondary Plan and stage is set to initiate St. George Campus Master Plan/capital plan 10-year update and new Public Realm Plan
- Ongoing efforts on St. George Campus heritage files
- UTSC continues to work towards its Secondary Plan adoption, supported by UP as required
- Project planning of Laneway housing and Living Lane in Huron Sussex neighbourhood ongoing. 'Pilot' project for Living Lane with community including laneway street art competition and implementation including street furniture, scheduled for Spring 2023.

Leadership in Space Planning and Future Capital Planning Initiatives
- Future of WorkSpace Tri-Campus Group issued 2nd memorandum of Guidelines & Best Practices to help steer new projects & renovations over the long-term.
- Long range faculty master plans/master programming on St George Campus advanced: study completed for KPE; Ongoing studies include building renewal plan at OISE; Faculty of Music, Faculty of Pharmacy on pause. New Facilities & Services facility master planning study initiated.

Advancement of Real Estate and 4 Corners initiatives – Planning & Development
- Development potential and planning review to support Real Estate's Knox College acquisition

OREP Finance Team

- **OREP Finance Service Delivery Model Transformation Project:** Conducted OREP finance review and developed a strategy and roadmap for OREP finance structure and service delivery model transformation.
- **Project Management Fees Model**: Refined and updated the multi-year PM fee model forecast
- **Developed OREP Delegation of Authority (DOA) framework** to standardize and simplify processes while enhancing accountability
- **Solution Exploration**: exploring collaboration opportunities for finding/developing a solution to improve financial data analytics capacity, review invoice automation solution options and prepare for future Accounts Payable automation.

OREP HRE

- **Strategically supporting the OREP divisions in implementing their strategic and workforce plans**
- **OREP PEP**: in 2022, OREP added 27 new employees to the workforce.
- **Streamlining process to increase operational effectiveness and t**o leverage learnings from the pandemic work experience
- **Implementing EDI, wellness, and conflict navigation initiatives** across OREP HR; helped create proposals to allow all employees learning and development opportunities including cross training and skills improvement and championed Unconscious Bias training

Office of the VPOREP

- **UniForum Data Collection:** Completed our third data collection, involving 800+ participants; have launched Year 4 collection and are now disseminating the data received through the collection
- **Business Continuity:** BC Working Group in continues to meet semi-annually to review shared services plans to ensure that BC Plans remain current and proactive; a tri-campus tabletop exercise (crisis: IT outage and/or cyber security attack) is being planned for late fall 2023, along with a BCP-athon in late summer in support of academic divisions' BCPs
- **VPOREP Awards and the OREP BBQ:** over 620 OREP staff joined us at the Daniel Wilson Quad for the 7th OREP Thank you BBQ & Awards event. OREP awards have seen no lessening of popularity and this year, staff were presented with 19 Distinguished Service Awards; 8 Impact Awards (Individual); 101 Impact Awards (Team) to members from 10 OREP and cross-divisional teams; and 10 inaugural Service Excellence Awards (for those key, previously unsung heroes, whom a unit could not do without)