

Annual Report 2023-24

# Operations & Real Estate Partnerships

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Scott Mabury  
Vice-President, OREP



UNIVERSITY OF  
TORONTO

## **Land Acknowledgement**

We wish to acknowledge this land on which the University of Toronto operates. For thousands of years, it has been the traditional land of the Huron-Wendat, the Seneca, and the Mississaugas of the Credit. Today, this meeting place is still the home to many Indigenous people from across Turtle Island and we are grateful to have the opportunity to work on this land.

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## OREP's Response to Institutional Priorities



**Embrace Our Place** through developing and implementing strategies to increase housing supply for faculty, staff and students; preplanning for the University Park project.

University Planning (page 11) and Spaces and Experiences (page 12) expand on their efforts to leverage our location, including efforts on the University Park project

**Reinventing Undergraduate & Graduate Education** by facilitating innovative, high-quality experiences and successes.

F&S actively supports research and learning through its initiatives (page 7)

Institutional objectives for 2023-24: OREP units have contributed towards the following collective objectives, as highlighted throughout our report:

**Student Success: Expand and develop opportunities that build research skills and literacy**

F&S outlines its commitment to the University’s academic mission through active support of research and learning (page 7)

**Leadership: Enhance research security and IT security.**

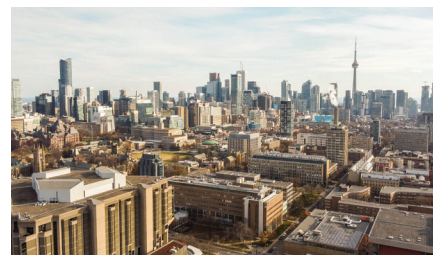
Last year saw a continued emphasis on Information Security, focusing on implementing the multi-year information security plan. We made significant progress in many areas of IT security, as outlined in the ITS report (page 14)

**Advancing Sustainability**

F&S is justifiably proud of the leadership role it continues to take in the major sustainability initiatives and process support, which contributed to the University of Toronto being named the most sustainable university in the world in the QS World Rankings—a testament to our commitment to leadership in sustainable practices and initiatives. (pages 6, 7 and 9)

**Optimizing Financial Resources to Support the Educational and Research Mission**

Planning & Budget prepared a balanced budget plan for 2024-25 that reflects constraints on revenue generation, inflationary pressures on expenses, and uncertainty around international permits and the Government’s response to the Blue-Ribbon Panel recommendations, having engaged with the BRP to help inform members of our institutional initiatives and priorities (page 16)



# Facilities and Services

(Ron Saporta, COO)

Priority: Reinventing Undergraduate & Graduate Education

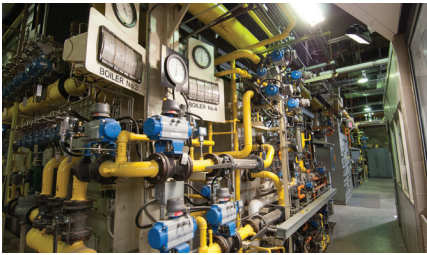


F&S has made significant strides in preparing to sustainably support the future growth of the campus while continuing routine, round-the-clock maintenance, and successfully delivering on client and capital projects.

## Operational Highlights

The accomplishment **we are most proud of this year is both leading the major initiatives and supporting the process which contributed to the University of Toronto being named the most sustainable university in the world in the QS World Rankings**—a testament to our commitment to leadership in sustainable practices and initiatives. We set very high sustainability and decarbonization goals and consistently work hard to deliver on them.

F&S in numbers:



# 50,347

new service orders created for F&S

# 75,435

facilities and campus safety related calls answered by the call centre

# 2,108

service alerts issued about planned maintenance, projects, shutdowns, and disruptions on campus

### Reliability and Stewardship

- 183,000 MWh of electricity delivered to 85+ buildings with a 99.98% reliability
- 370,000 tonnes of steam and hot water delivered with a 99.94% reliability
- 1,126 monthly building inspections completed
- 800+ electrical shutdowns and design and equipment reviews completed
- 1,900+ emergency generator inspections and tests conducted on campus
- 15,400 of electrical equipment scanned for safety
- \$395,000 contributed towards proactive asbestos abatement projects
- 119 annual fire drills conducted

### Engagement

- 21,040 e-newsletter opens by readers
- 252,000 impressions by the top three performing social media campaign

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## Excellence in research and teaching

F&S is committed to directly contributing to the University's academic mission by actively supporting research and learning. In 2023-24 F&S:

- **Employed 33 UofT students and recent graduates** through UofT's Professional Experience Year (PEY) Co-op and Work Study programs, which included creating three new PEY co-op roles for engineering students to fully immerse in on-campus maintenance and operations for a rich and diverse learning experience. Individuals performed significant and meaningful work, including analyzing large sets of data to extract insights to identify improvement opportunities, reviewing and updating technical drawings, creating automated and streamlined workflows using a variety of tools, coordinating and hosting events, building informative and valuable SharePoint sites, and developing content for web and social media channels.
- **Contributed over \$400,000 in funding to five sustainability research projects** through the University's **Climate Positive Energy** initiative. This provided over 200 students with the opportunity to participate in projects focused on intelligent buildings (digital twin), renewable energy, energy efficiency, health and well-being, and scope 3 emissions.
- Supported student development by **actively participating in courses and practicums**; provided real-life problem-solving opportunities for students through the undergraduate and graduate Campus as a Living Lab courses (ENV461/1103), Engineering Strategies and Practices (ESP) and Professional Experience Courses, as well as engaging different student audiences through multiple presentations, including all first-year civil and mineral engineering students and the Environmental Writing course (INI196)

### In addition:

- **Developed a multi-year strategy and funding plan for the implementation of phase one of the Utilities Master Plan** as part of the institution's **Climate Positive Plan**.
- **Developed a deep building retrofit program:** A replicable model for deep energy retrofits across campus was developed. As a result of this project, we will see a 75% reduction in the GHG emitted by four priority buildings, as well as addressing a material portion of the deferred maintenance backlog, all while generating utility savings to generate a payback
- **Support the Toronto Board of Trade (TBOT) energy storage pilot:** As part of the TBOT pilot project in energy storage, F&S has partnered with a local clean-tech start-up company based in Toronto. Their technology allows

for the electrification and storage of high temperature thermal energy. Work is underway to integrate the system with our central plant.

## Progress on our strategic priorities

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 2023-24, considerable progress was made on the goals and objectives set last year towards achieving our strategic priorities

### Great place to work

- **Successfully recruited 18 central steam plant operators and building engineers** who are essential to keeping campus running 24/7/365. Representing 25% of the utilities and building operations workforce, these vacancies are typically hard-to-fill and were a result of concurrent retirements of long-term employees.
- **Implemented 50% of the ideas submitted by F&S staff through the Innovation Challenge** to advance our strategic priorities. All teams partook in collaborative ideation and problem-solving using visual boards—discussing hundreds of ideas and submitting the most promising for funding and organizational support.
- **Actively supported charitable causes and fundraising events**, including the donation of 16 bags of toys to the UofT Student Union in support of UofT student families and raising over \$2,000 in our “Movember” Campaign in support of men's mental health, suicide prevention, and cancer treatment.
- **Campus Safety participated in a national study designed to proactively improve special constable mental health training and research.** The research project is part of the Canadian Institute of Public Safety Research and Treatment and will provide Campus Safety members with tools to better manage their stressors and enhance their personal resilience.

### Leadership in campus stewardship

- **Conducted 60 accessibility design and site reviews for capital projects** and, through the AODA fund, advanced 11 accessibility projects in various stages, including the installation of accessibility ramps at Knox College and power door operators at the Medical Sciences Building, as well as multiple feasibility studies.
- **Completed a gap analysis** in response to newly published standards from the American Society of Heating, Refrigerating, and Air-Conditioning Engineers (ASHRAE), which apply to HVAC systems serving almost 800 campus classrooms, lecture halls, and auditoriums. Developed

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and resourced a plan to ensure building readiness for all impacted facilities on campus.

- **Updated and released five design standards**, enhancing the University’s baseline expectations for bid and construction documents submitted for new construction, renovation, renewal, and maintenance projects on the St. George campus. These include the deliverable standard, roofing design standard, door hardware design standard, facility accessibility design standard, and the lighting and lighting control design standard.
- **Updated our vendor of record lists** and are developing a vendor evaluation process, which will assess vendor performance on dimensions of cost, quality, schedule, and safety on completed construction and renovation projects—elevating overall quality of partner selection.
- **Established a contract for emergency response services** that will improve timely responses to different emergencies on campus. To date, our partner has successfully responded to four emergencies on campus, preventing significant infrastructure damage and associated costs.

### Superior customer solutions

- **Developed a simplified prioritization framework for service requests** based on a large-scale environmental scan of peer institutions. The new framework is being built into applications and processes, allowing for consistent prioritization of service requests, more effective identification and response in emergencies, and response time tracking against sector benchmarks.
- **Built Power BI operational and maintenance dashboard to monitor, track, and manage metrics and identify trends** on customer service, preventive maintenance, cost, efficiency, and reliability of building systems. They will be rolled-out to management to improve data-driven operational decision-making.
- **Readied the Schwartz Reisman Innovation Centre (SRIC) for tenant occupancy**, transitioning the facility from a construction site to an occupied A class commercial environment. SRIC is currently operating under a new model of contracted external services for most functions and supporting UofT Real Estate to lease the remaining vacant space in the building.
- **Achieved a record low number of out-of-service elevators** through systematically addressing issues, expediting repairs, completing installations, and returning to service two elevator cars that have been out-of-order for several years. Reduced the number of ‘false elevator entrapments’ by standardizing triaging of calls in the call centre, which cut vendor time and cost by avoiding unnecessary emergency response.
- **In close collaboration with the Office of Indigenous Initiatives, developed and implemented a new**

**accessible model for individuals and groups holding smudging and other Indigenous ceremonies involving fire/smoke on campus.** Instead of approving events, Fire Prevention works to enable ceremonies while ensuring fire safety through advance notice and implementing Fire Watches. A successful pilot of the new process was conducted in the summer and fall, following many consultations and committee reviews, and securing the endorsement of the Elders’ Circle.

- **Launched a new social media strategy**—achieving a monthly follower growth rate 740% higher than pre-strategy. Also launched new accounts for F&S with 1,140+ followers and made successful collaborative posts with Student Life, UofT Communications, and the Faculty of Kinesiology & Physical Education on a variety of topics. We continue to focus on building relationships to engage our community on sustainability, safety, and stewardship topics and stories—promoting the F&S brand and increasing visibility to its services.
- **Continued to implement recommendations from the Provostial report on *The Role of Campus Safety in Responding to Students in Mental Health Crises*.** This year: focused on mental health training in partnership with the Centre for Addiction and Mental Health, customer service and de-escalation training for communications operators, and certifying as instructors in the “Stop HARMS Violence Minimization” program which allows delivery of customized workshops to students, faculty, and staff.
- **Trained over 500 staff and students on the safe and correct use of fire extinguishers** in-person, and in collaboration with the Learning and Leadership Centre launched a “How to Use a Fire Extinguisher” online training module for staff.
- **Greatly enhanced fire safety information on the F&S website**, including the addition of Fire Watch procedures, resources on fire alarm and sprinkler system testing, and a schedule for fire drills. The Fire Services team also ran in-person and digital outreach activities during Fire Prevention Week in October.
- **Participated in the development of the first in Canada “Close Protection VIP/Executive Protection Course”** designed uniquely for special constables in partnership with the Ontario Police College and the Ontario Provincial Police. This will permit UofT St. George special constables to expertly work in partnership with visiting police and special security services to support dignitary visits to the University.
- **Signed a contract for one single snow plowing and removal provider for the entire campus in a joint procurement with Transportation Services.** This improves cost and operational efficiency of the service and allows us to better manage quality of snow removal across the whole campus.



## Innovative technology

- **Enhanced our collaboration with University Planning, Design, and Construction (UPDC)** and elevated the quality of capital project documents by implementing a portal for the review of UPDC design packages and shop drawings as well as instituting a modernized digital review process that ensures better quality control of large design packages and shop drawings for capital projects.
- **Improved the cost efficiency of expanding our building automation system (BAS)** and created capacity for improved service delivery and management of building systems by doubling the list of qualified BAS suppliers and manufacturers through a series of rigorous compatibility tests.
- **Took steps towards improving the reliability of BAS controllers** by completing network communications tests to identify communication collisions on the F&S network. Also identified and begun to take corrective actions to resolve related challenges.
- **Introduced a new emergency callout module for after-hours emergency phone calls** made by Campus Safety—replacing outdated software and allowing for more efficient and expedient communication with service providers who are needed on campus in the event of after-hours emergencies.
- **Designed and developed a comprehensive database and contracts management application to better track, report on, and manage all service provider contracts.** The application is synced to real-time financial transaction data to provide up-to-date information—improving efficiency by eliminating manual data entry and reducing errors.
- **Actively supported Financial Services and Procurement Services with significant enterprise IT priorities and projects,** including the roll out of phase two of the Electronic Fund Transfer project, piloting and testing a new vendor management account workflow, and participating on the University-wide AMS/SAP Advisory Council.
- **Piloted and expanded the use of enterprise Microsoft tools to streamline and automate administrative tasks and improve document and project tracking.** Built an end-to-end multi-approver document review workflow with a plethora of automated features and launched a simplified and automated request for mechanical access process.

## Impactful sustainability

- **More than doubled our on-campus renewable energy generation** by installing our largest rooftop solar array at UTL Downsview, which added 370 kW of solar capacity.
- **Secured public and private financing and a design build partner and launched Project Leap,** marking a significant milestone in decarbonization at the University. Project Leap will cut greenhouse gas emissions on campus in half by 2027. Announced officially to the University community in February, Project Leap garnered 105,000 impressions on social media.
- **Secured almost \$13 million in grants and incentives to support energy efficiency projects** on campus.
- **Launched a Student Sustainable Ambassadors program** with ten student volunteers who support events across campus and champion sustainable practices.
- **Launched our newest Sustainable Change Program called Sustainable Students** targeting all students at UofT to engage and inspire.
- **Awarded over 250 sustainable change certifications** to offices, residences, events, labs, and courses across campus—including convocation, which received a platinum sustainable event certification.
- **Continued implementing our fleet electrification strategy,** replacing aged vehicles with newer electric ones in Grounds and Environmental Protection Services



# University Planning, Design & Construction

(Dave Lehto, Chief)



## Office of the Chief

- Implemented the **UPDC awards** to recognize and honour superior performance
- **Grew the UPDC team** while having very little staff turnover.
- **Increased our major contractor pool to 16** from 5 in early 2022, thereby diversifying competition and reducing construction fees to deliver our Level 2/3 projects.
- Managed the **swift increase in Level 2/3 projects in construction** going from 8 in early 2022 to >30.
- In our continuing efforts to **practice smart construction and provide “value for money” to our clients**, we are making full use of technologies and techniques to improve productivity, maximize user benefits and minimize whole life cost, and improve sustainability. This year, we established a Risk & Issue Register and finalized a Building Information Modeling Execution Plan (BEP) template for Level 2/3 projects, and for all capital projects, we finalized the F&S Deliverable Standard.
- Recruited an **Executive Director** to enhance and improve the delivery of our capital project portfolio.

## Project Management

- **Updated the Construction Management RFP and Supplementary General Conditions** with lessons learned and contractor feedback following the execution of numerous Construction Management contracts.
- Expanded **External Project Management Vendor of Record** from 5 to 14 firms to draw on PM talent.
- Consolidated 4 project tracking and reporting documents into a **“single source-of-truth” database**.

## Design & Engineering

- Recruited additional **engineering and architectural staff** to service more CaPS approved projects.
- Implemented **building information models (BIM) on all new projects**.
- Completed BIM **Clash Detection training** for D&E projects to develop a new service for Level 2/3 projects.
- Undertook the McMurrich **Future Workplace** feasibility study to gain awareness of the future direction.

## Project Development & Controls

- Centralized the **Project Controls team** (procurement, permitting, document control, cost estimating).
- Implemented an **electronic signature process** across all contracts.
- Onboarded the **Integrated Project Delivery (IPD)** project team for the Temerty Building project.
- Recruited a **Manager of Quantify Surveying (QC)** and a junior **Cost Estimator**.
- Built a **Cost Book** database with 33 projects.
- Updated the **OAA Doc 600/800** contract.

# University Planning

(Christine Burke, AVP)

Priority: Embrace Our Place



## Master Planning / Planning Policy / General Planning

- **St. George Campus Secondary Plan** came into effect as of July 28, 2023
- initiated pre-planning for a **new St. George Campus Master Plan/capital plan 10-year update** and **new Public Realm Plan**
- **Advanced Huron Sussex Neighbourhood low-rise infill planning**

## Leadership in Space Planning and Future Capital Planning Initiatives

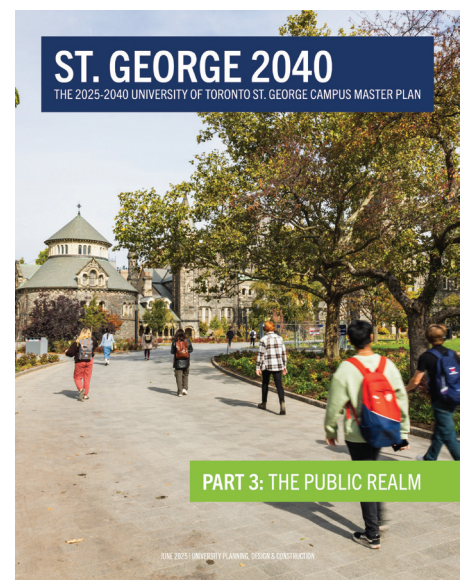
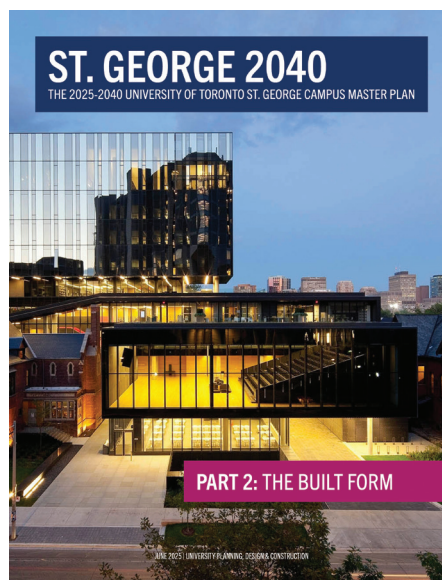
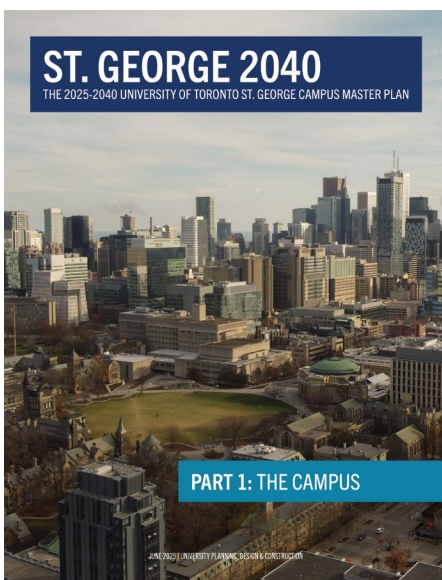
- As 2023-24 was a reporting year for Council of Ontario Universities, **UP led the submission of University of Toronto COU tri-campus space and allocation reporting.**
- **Advanced long range faculty master plans/master programming on St George Campus** including Facilities & Services facilities master planning study and OISE building renewal plan. The Faculty of Engineering facilities master planning study was initiated in 2023, and is underway.

## Major Capital Projects in Pre-Planning/Concept Phase

- Advancing future **Indigenous Hub** at St George Campus.
- Advancing planning for **CAMH lands - 33 Ursula Franklin**

## Major Capital Projects in Planning Phase

- Numerous projects are moving ahead in Planning Phase



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# Spaces & Experiences

(Anne Macdonald, AVP  
S&E and Sonya Donovan,  
Managing Director, Real  
Estate)

Priority: Embrace Our Place



## Economic objectives

- **Restructuring of the Food Services department** was completed to achieve financial sustainability given the new demand patterns associated with post-COVID landscape.
- **Completed the acquisition of a 20% stake in CampusOne, immediately adding as many as 890 beds to the university's student housing stock for a purchase price of \$55M.** The unique deal increases the student housing stock by 9%, helping to address the rapidly rising demand for student housing and allowing UofT to better meet its first-year residence guarantee for fall 2024 in a residence directly adjacent to campus, without the long lead time, costs, and resources that a new build typically entails.

## Operational objectives

- **Schwartz-Reisman West opened in October 2023** and is now fully operational. The building is over 70% leased with significant interest on the remaining vacant spaces including the 3rd and 4th floors. It is anticipated that by the end of 2024 the building will be over 90% leased. Campus Events manages the event space on the 2nd, 7th, and 10th floors as well as the meeting rooms throughout the building.
- **Completed buyout of lease on CAMH lands (250 – 252 College Street, 33 Ursula Franklin)** as well as the purchase of 175 College Street for a combined purchase price of \$40.3MM. CAMH will immediately relinquish approximately 175K square feet of space at 33 Ursula Franklin which the University will use to satisfy its own space requirements. CAMH will continue to occupy 250 – 252 College for a minimum of five years. The 4.23 acre parcel at the southwest corner of the St. George campus provides a future expansion opportunity for the university while the 175 College Street property allows for future academic expansion.
- **Oak House opening postponed to May 2025.** Significant work has been completed this year to progress the development, with delays to opening being driven by issues with some trades, and hydro connection delays. Opening in spring 2025 will allow for a softer launch with summer rental business, allowing the team to work through the inevitable operational challenges that come with bringing a new building online. This will help to ensure a smoother transition when the first group of students are welcomed in August 2025.
- **Organizational structure for Conference Services** was established, including the addition of an Assistant Director, Conference Services, and a Media Productions team (a cost recovery unit which previously reported to the Library). The Chestnut 2nd floor rebuild is proceeding in summer 2024. The launch of SRIC event spaces and meeting rooms has been prioritized by the team, with the launch of the full conference offering planned for fall/winter 2024-25.

## Strategic objectives

### Rewire & Integrate

- **Systems review completed** and opportunities identified and prioritized.
- **Ongoing work with OREP's Financial Hub** financial processing review as a key stakeholder
- **Real Estate review completed**, mapping out RE's current processes and identify gaps and areas for improvement.
- **Executive Director, Student Housing and Residence Life role created in collaboration with Office of the Vice-Provost Students and the Provost's office.** This individual will work closely with the Provostial Advisor on Residences to develop a housing strategy/master plan for the campus.
- **Review of Operations portfolio complete.** Executive Director, Operations and Project Implementation role description in progress with recruitment anticipated summer 2024.
- Preliminary work done towards the **integration of a Commercial/Residential property & project group** in the Operations portfolio.

### Lead & Innovate

- Legal and financial investigation continues to **identify potential options for home ownership** that could work within some of the active pre-development sites. It is anticipated that further advancements will be made through 2024 to understand what pathways forward may exist.
- **Tri-campus working group on food accommodation/allergen labelling** was created and the inaugural meeting was held in February 2024. Proposed work for this group has been expanded to include availability and protocols around other foods, including kosher/halal/vegan/gluten-free. Inventory of current practices has been undertaken to identify inconsistencies.

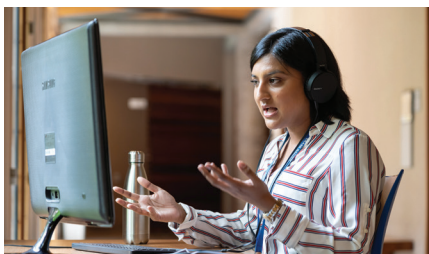
### Create Welcoming Environments

- **Robust staff engagement** was undertaken across the entire division through the EDI working group to gather feedback on a draft divisional EDI action plan. The final plan was confirmed in late 2023 and implementation of action items is in progress. Two particularly successful initiatives in response to the plan included the Black History Month staff lunch (complete with the launch of a new merchandise collaboration), and a session on inclusive recruitment at the March management meeting.



# Information Technology Services

(Bo Wandschneider, CIO)



Last year saw a **continued emphasis on Information Security**, focusing on implementing the multi-year information security plan. ITS made significant progress over the last year highlighted by the following:

- **Security Awareness Training:** By the end of March 2024, 7,000 staff and faculty had enrolled in security awareness, with over 2,800 trained.
- **Trusted Devices:** Over 10,000 devices were protected through enrollment in next-generation endpoint protection across UofT.
- **Vulnerability Management:** Institutional visibility into security vulnerabilities has increased eightfold over the course of the financial year.
- **Information Security Strategy:** Released the University of Toronto's information security strategy after extensive and broad consultation with the University community.
- **Secure Network:** Enhanced network security by upgrading University's edge firewall and through a tri-campus licence moved closer to standardization of firewall technology.
- **Better Academic Resiliency:** Incident response tabletop exercises were completed by seven academic and administrative divisions. This is essential in helping divisions understand their gaps and accountability.
- **Identity Management:** Continued gathering requirements from the community
- We **continued to support provincial and national initiatives such as CanSSOC**. The threat sharing service matured and we received timely threat intelligence from major breaches like those at Winnipeg and Memorial that significantly mitigated risks.

ITS placed a **major emphasis on enhancing the end-user experience and realizing process improvements.**

- By end of May 2024, 75% of the university's ~12,500 phone lines assigned to individuals will have been ported to **MS Teams Voice**. Departments that migrate their VoIP lines to MS Teams will benefit from a ~30% (\$540,000/year) reduction in monthly VoIP line costs.
- In 2023, EIS replaced **1,647** legacy **wireless access points** in **51** buildings across all three campuses. Additionally, **488** new access points were deployed in 11 new and renovated buildings on the three campuses. There over 9000 access points across the tri-campus.
- In 2023 additional 10 units/divisions subscribed to **Network as a Service** (NaaS), with 5 more in progress. This allows departments to free up local IT resources by engaging EIS to manage their departmental networks thereby enhancing resiliency and security
- The **research data centre** renovation in McLennan Physics, in partnership with the Faculty of Arts & Science, will be substantially complete and ready for occupancy in May-July 2024. The facility will provide central research server colocation in a secure facility managed by ITS/EIS data

- centre professionals, leading to enhanced resiliency and security.
- ITS played a crucial role in implementing **modernized technology, IT support and services**, and setting the new high level of *IT standards* across the university, including the following areas: Audio/Visual, Meeting Room Booking System, Network/WiFi Connectivity, Hoteling Workstations
  - ITS continues to provide leadership, along with the Library and VPRI, to support **enhancements to the University's digital research infrastructure**. In partnership with divisions, ITS continues to participate in the successful design and support of the new digital buildings on campus (Schwartz Reisman Institute for Technology and Society and FitzGerald) through integrated AV and audio meeting room solutions, implementation of advanced room and hotel space booking software, and support for Microsoft 365 solutions for hybrid teams and events on campus.

Continued the **digital modernization of our major systems in HR, Finance, Research and Student Life** with the goal of enhancing efficiency and effectiveness:

- This year, in partnership with the Division of People Strategy, Equity & Culture (PSEC), ITS has initiated a series of projects to fully transform significant portions of HRIS from hire to retire. Phase 1 of the **Employee Central** project was completed, establishing a foundational HRIS operating model and identifying key business processes for most of the Appointed Employee Groups. Conducted a review of enterprise human resource timekeeping requirements, anticipating the Kronos end-of-life product deadline in December 2025.
- In partnership with Finance, supporting the **Electronic Funds Transfer (EFT)** project to transition vendor payments by paper cheque to direct deposit. This is one of the major strategic enhancements to improve end-to-end process, modernize financial administration and increase effectiveness and efficiencies. Work on phase 3 of this project began in June 2023, resulting in streamlined processes, particularly in Accounts Payable (FSD) for reviewing and approving supporting documentation for payments. This phase also continued the strategic onboarding of existing UofT vendors. As of early March 2024, **a total of 931 vendors have been onboarded. EFT now accounts for 26% of Canadian payments.**
- **The Natural Sciences and Engineering Research Council of Canada Undergraduate Student Research Awards** were automated within SAP, providing greater transparency of awards, while substantially reducing the administrative time to create Funded Research Digests for faculty.
- A new **Environmental Health & Safety (EHS)** application for the University was selected through a competitive

procurement process. In partnership with the Division of the Vice-President, Research & Innovation, implementation of the foundational components of the new Safety Stratus (EHS) application is in progress and will be integrated with key enterprise research, human resources and learning systems.

- UofT migrated its Administrative Management Systems from outdated infrastructure to the **public cloud**. In addition, backend systems underwent a comprehensive conversion to S/4HANA, aligning our technological infrastructure with cutting-edge solutions, and enhancing technological resilience, by establishing a Disaster Recovery (DR) site. This initiative ensures a robust and fail-safe architecture, bolstering our capacity to navigate unforeseen challenges and disruptions.
- Salesforce Customer Relationship Management tool for FAS and KPE registrars has been implemented as the foundation for **a Student Advising Service (SAS)**. This innovative solution provides an interconnected student story, streamlines the student and staff experience, promotes evidence-based student support practices, ensures consistent and transparent service delivery, and increases administrative efficiencies.
- In partnership with the Office of the Vice-Provost, Innovations in Undergraduate Education (VPIUE), and the School of Continued Studies, ITS is working to enable UofT to respond efficiently and effectively to government initiatives such as OSAP for **micro-credentials**, the OMC Framework, and future rounds of Challenge Funding.
- ITS launched the **IT@UofT governance model** with the establishment of the IT@UofT Board (senior University leadership) and the IT@UofT Business Board (CAOs) helping to bring transparency and oversight to the entire IT@UofT portfolio.

#### Unforeseen accomplishments:

- Responded with agility to **Generative AI**, including testing and deploying specific technologies such as Microsoft (Bing) Copilot and Contact North AI Tutor. Supported initial policy work from the Provost's Office and CTSI, among other stakeholders. This positions UofT with increasing maturity to respond to new developments, including the establishment of the new Provostial Advisory Task Force on AI
- Undertook successful searches for a new **Executive Director of Enterprise Applications and for the Chief Information Security Officer**, two roles that are critical to the functioning of the university and had high-profile incumbents.

# Planning & Budget

(Jeff Lennon, AVP)



## Institutional Data Strategy (IDS):

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

- Operated and maintained **institution-wide data marts** to support planning and decision making across divisions.
- Launched a Working Group to promote **data stewardship of EDI-related datasets** while aligning institutional datasets with respect to data collection and use.
- Released an **institutional data access guideline** to establish clear expectations for governing how users access institutional data.
- Initiated a joint initiative with Information Security to develop a **data classification framework** to prioritize efforts and spending to secure the most critical data effectively.
- Successfully migrated the on-premises **Institutional Data Warehouse database into an Azure Cloud** database for long-term sustainability and improved access.
- Launched a Working Group to develop solutions to address **data literacy** that include implementing a 'data wayfinding' service, and introducing best practices related to data visualization and the adoption of analytical products.
- Launched the institution's inaugural **Data Summit 2023** to promote visibility of institutional data/analytics initiatives, share best practices, and foster peer-to-peer connections.

## Budget Processes and Structures

- Engaged with the **Government's Blue-Ribbon Panel** to help inform members of institutional initiatives and priorities.
- **Prepared a balanced budget plan for 2024-25** that reflects constraints on revenue generation, inflationary pressures on expenses, and uncertainty around international permits and the Government's response to the Blue-Ribbon Panel recommendations.
- Worked with the Vice-Provost Strategic Enrolment Management to implement and operationalize **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 started in Fall 2023.
- Supported Year 4 of the **UniForum** data collection and further integrated benchmarking data into the University's planning processes.
- Collaborated with other shared service units on advocacy in response to the Federal Government's decision to cap **international study permits**.
- Supported a key Provostial priority by developing a funding framework for a **significant increase to graduate student funding**.



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- Expanded the **P&B shared services hub** to provide back-office finance and payroll services to six divisions (Communications, International, GRO, OUC, Governing Council, and Finance).
  - Worked with SGS and SEM to **review graduate fee billing processes** and consider implications of moving to a 3-term model of fees assessment. This multi-year project will continue into 2024-25.

### Reporting & Analytics

- Collaborated with the Provost portfolio on the requirements for **student EDI data management** and rollout of a new **Faculty Graduate Appointments dashboard**.
- Implemented a **new version of public reporting** (e.g. Facts & Figures) that includes a comprehensive list of metrics that reflect key information across all domains of operations. Initiative yielded improvements in terms of metric selection, reporting, and usability.

# OREP Finance

(Helen Bao, EFO)



## OREP Finance Hub Consultation and Design:

OREP embarked on a journey to design and establish a Finance Hub to enhance operational efficiency and improve financial management capacity within the portfolio, under the guidance of OREP Finance and as part of a service delivery model transformation strategy. An extensive review of OREP's finance function has been conducted, and consultation with key stakeholders has taken place, resulting in process improvement recommendations and the exploration of potential future technology solutions. OREP Finance is currently developing a comprehensive Hub implementation plan. Additionally, OREP finance teams are adopting transitional approaches to enhance transactional support to operations while preparing for the launch of the Finance Hub, such as improving staff attraction and retention in the UPDC finance team and leveraging the Ancillary finance team to enhance support for the Real Estate portfolio.

## Strategic Resource Planning:

Provided leadership, support, and coordinated the 2024-25 DAC submission for OREP. Worked closely with departments and related stakeholders to address financial pressures and constraints through priority review and resource reallocations, ensuring reserves are managed within target limits.

## Enhanced support to capital projects:

- Worked with stakeholders across the institution to define major capital project finance-related processes and communication and collaboration protocols.
- Provided enhanced financial planning and management support to large capital projects, starting from Level 3, such as Temerty, SRIC-W. Devised project related financial management strategy, identified and solved issues, and improved communications.
- Maintained a multi-year PM fee model; monitored, and analyzed PM fee collection and expenditures routinely; and managed their impacts on the bottom line. Various models and scenarios were considered and supported by financial analysis to inform further decision-making on PM fee collection.
- Managed and coordinated annual capital cash flow projections for UPDC and Real Estate, and collaborated with Financial Services to support debt management decision-making. Also provided a 5-year capital project plan forecast to P&B for budget allocation plans for future projects.
- Improved the UPDC finance team's capacity to better support business operations.

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### **Controllership and Institutional initiative support**

- Represented OREP as Financial Services pursues their Electronic Fund Transfer project
- F&S procurement developed procedures and conducted roadshows to ensure compliance with procurement policies
- Evaluated the impact of CRA's new trust tax reporting rules and collaborated with impacted departments to ensure compliance.
- Worked with central procurement to assess the impact of the updated BPS Procurement Directive and the Building Ontario Businesses Initiative Act (BOBIA)

### **Reporting and Analysis:**

- OREP Finance began adopting budget calendarization in FIS to improve expenditure monitoring and analysis capabilities.
- Developed dashboards in ITS as a pilot project to support financial management and decision-making.
- Exchanged ideas with the Provost's Office for dashboard development and explored collaboration opportunities

### **Solution Exploration:**

Explored potential solutions that could support future technology transformation in the finance function, including workflow management, data integration, and accounts payable automation, by working with the extended network within and outside the institution.

### **Operation Priority Support:**

Finance teams are closely involved in providing support for some major operational initiatives, such as:

- Dolphin upgrade/testing due to potential compatibility issues with SAP HANA patch deployment
- Designed and developed a comprehensive database to report and manage F&S Contracts
- Tested financial applications to evaluate any impacts caused by a system upgrade
- Provided financial leadership and administrative support for the 2023 Canadian Higher Education Information Technology (CANHEIT) national conference hosted by ITS, which was a resounding success. It included hundreds of IT leaders from across Canada and contributed \$70k of proceeds that ITS used (in-part) to celebrate and advance the activities of IT@UofT.

# OREP HR

(Lori-Anne Hill, Director)



## Process/ Policy Alignment

Despite some staffing challenges this year, the team continued to provide a variety of services integral to OREP colleagues and staff. The addition of new team members, including an Assistant Director, resulted in new ideas, concepts and the challenging of existing processes. The team continue to refine and advise on: Alternative Work Arrangements; collective agreement implementation; vacation management planning; and recruitment processes.

## Collective Bargaining

OREP HR is a key partner in the collective bargaining process. OREP HR participated at CUPE 3261 Full-Time & Part-Time, CUPE 3261 Casual, CUPE 3261 Chestnut, Unifor, Local 2003, USW 1998 Local 1998 (Appointed) and USW Local 1998 (Residence Dons) tables.

## Training Opportunities

- OREP HR continues to work with departments on specific training to their teams, and to empower managers to reinforce the principles of equity, diversity and inclusion.
- Provides tools and supports to managers as they work through challenging situations that occur in the work environments.
- Worked specifically with Spaces + Experiences to review the results and report for their departmental survey on EDI and joined their management team in an HR training meeting where diversity in recruitment, upcoming process changes, collective agreement application and more were discussed.

## Data Management

- This year, the OREP HR team focussed on a data assessment to prepare for future successes. A large employee file reconciliation was completed and parameters were established for online employee files.
- Vacation management remains a priority as we continue to address vacation liabilities. OREP HR is a member of the UTIME project leadership team and is a key stakeholder in the replacement of the Kronos timekeeping software. Ongoing commitment to reduce errors and provide accurate information.
- To support ongoing cybersecurity efforts, Lori-Anne was a member of the Security and Awareness Steering Committee.

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# Office of the VPOREP

(Elizabeth Cragg,  
Director)



## UniForum Data Collection:

The UniForum program offers a new way for us to understand how we operate. Through rigorous data collection, we can see how our service delivery compares to other universities around the world, and where to invest to remain competitive and relevant. UniForum is a multi-year program that will help us build the foundation to develop the service delivery models required to support a leading university in the 21st century

In 2023, UofT launched its fourth staff and supplier data collection, involving 800+ participants, and facilitated our third Service Excellence Survey (last completed 2021). Using the results the team has engaged divisions across the tri-campus – in some cases with multiple teams (strategy, finance, IT, student life) – as they consider possible operational efficiency initiatives.

## Operational Excellence Initiative (OpEx)

Soft launched OpEx with the inaugural meeting of the OpEx Advisory Committee in March. Established as an internal consulting unit to empower and enable our staff to continuously improve the service experience at UofT. Off cycle UniForum staff are proactively collaborating with divisions who are ready for change, supporting them and their transformation projects with UniForum data

## Administrative Leadership Forum (ALF):

At various times during the year, units within the Operations & Real Estate Partnership portfolio engage formally and informally with the administrative leadership of academic divisions. Divisional CAOs and CFOs are key partners in managing the University's operations, identifying best practices and opportunities for improvement, and mobilizing divisions to operationalize VPOREP initiatives. Feedback from this group had suggested that a regular forum was needed for consultation and information sharing between VPOREP units and divisional administrative leaders on operational issues and in 2016-17, the Office of the VPOREP began organizing a regular portfolio-level "middle table" meeting to facilitate engagement with the senior administrative leadership of the academic divisions. As the Administrative Leadership Forum (ALF) has evolved, senior leadership from across the institution has been invited to present to the group, to provide annual updates or on topics requested by members. The program this year included presentations by the President, the VP Advancement and the CFO as well as insight in to budget planning for 2024-25, presentations on Project LEAP and Deferred Maintenance, and ITS and Info Security updates.

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### **Business Continuity Planning (BCP):**

Facilitated by OREP, the Business Continuity Working Group continues to meet semi-annually and hosted a moderated Tabletop exercise in the fall, using a cyber-attack/IT outage as the crisis. As we continue to encourage and support divisional CAOs in the creation/updating of their unit/divisional BCPs, “Your BCP in 5 Steps” resources have been added to the BCP website. The inaugural “BCP-athon” was hosted, bringing tri-campus academic and shared service divisional representatives together to learn from international case studies and to receive support from Working Group members as they work through their own BCPs. McGill, UBC, TMU and York have engaged with us as they initiate or mature their own BCP processes.

### **OREP Awards & Annual Thank You BBQ:**

OREP awards success has not abated; in 2023, we awarded 5 Impact Individual, 7 Impact Teams, 15 Distinguished Service and 10 Service Excellence Awards in front of 600+ of our OREP team members at the annual BBQ on August 28. Since the program launched in 2015, 623 awards have been presented – and hundreds more have been nominated!





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