UNIVERSITY OF TORONTO

UNIFORUM & OPERATIONAL EXCELLENCE

Presentation to Business Board

OFFICE OF THE VICE-PRESIDENT, OPERATIONS AND REAL ESTATE PARTNERSHIPS

JUNE 17, 2025

UNIFORUM PROGRAM OVERVIEW

WHAT IS UNIFORUM?

36 participating institutions

- UniForum is a global data collection and benchmarking program
- The UniForum program collects data on service satisfaction, employee activities and supplier / vendor services.
- The collected data, in conjunction with other data points, supports University leaders in making decisions for the **effectiveness and efficiency** of administrative services
- Now a **Biennial program**, with data collection taking place between May and July every other year; service satisfaction surveys are distributed in October, 15 months after the collection
- UniForum **examines end-to-end services that support the university's teaching and research mission** to confirm:
  - What activities are taking place?
  - Where are the activities taking place?
  - How satisfied are staff, librarians and faculty with the services they received?

Global members include:
- Monash University
- University of British Columbia
- University of Birmingham
- UniFersity College London
- University of Edinburgh
- University of Melbourne
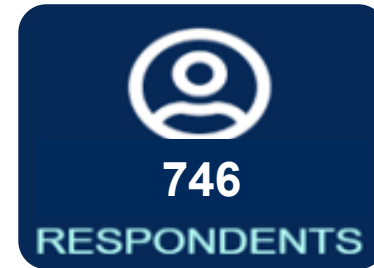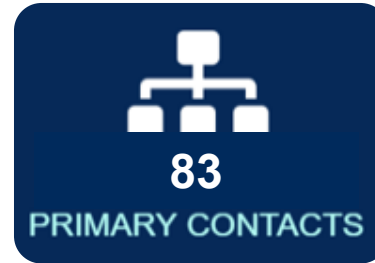- University of Sydney
- University of Toronto

RESULTS FROM FISCAL YEAR 2022/23
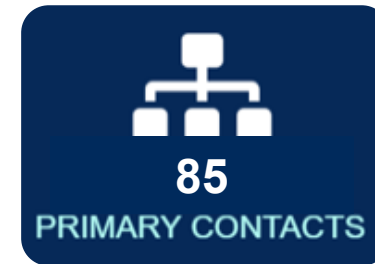
COLLECTION STATISTICS

2023

27,884
RECORDS COLLECTED

83
PRIMARY CONTACTS

746
RESPONDENTS

2022

26,286
RECORDS COLLECTED

85
PRIMARY CONTACTS

752
RESPONDENTS

2021

20,534
RECORDS COLLECTED

80
PRIMARY CONTACTS

740
RESPONDENTS
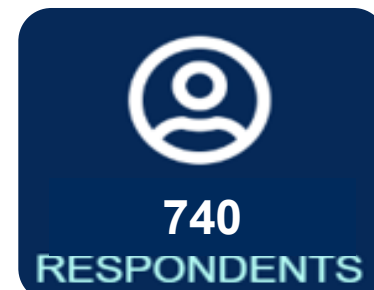
KEY FINDINGS

TOTAL OPERATIONS SPEND

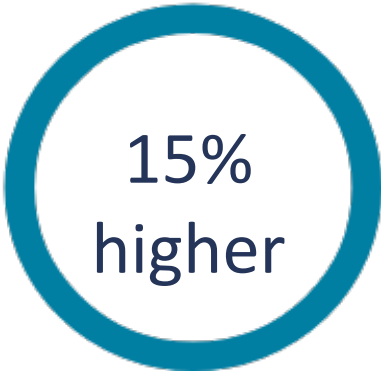UofT HAS INCREASED TOTAL OPERATIONS SPEND FROM $742 MILLION (2021/22) TO $772 MILLION (2022/23)

2020/21- $698 MILLION
2018/19 - $655 MILLION

↑ 4%

AVERAGE OPERATIONS SPEND PER WORKED FTE (wFTE)

0%

UofT HAS MAINTAINED THE SAME SPEND PER wFTE AT $105K FOR THE YEARS 2021/22 & 2022/23

2020/21 - $108K
2018/19 - $99K

15% higher

UofT OPERATIONS SPEND IS 15% MORE THAN THE AVERAGE UNIFORUM UNIVERSITY IN 2022/23.
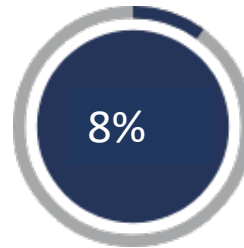
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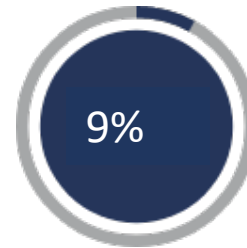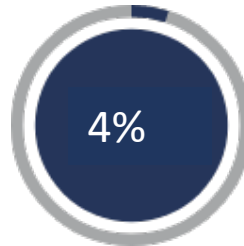# UNIFORUM BENCHMARKING & SUBSET ACTIVITIES

OPERATIONS

DEFINED AS:

administrative and support activities whose primary purpose is to support the day-to-day operations of the university

8%
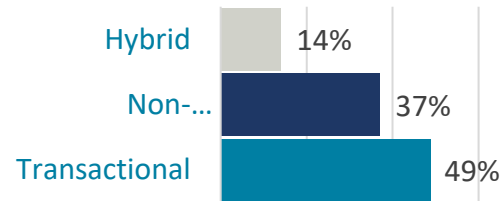RESEARCH FACILITIES

9%
DEVELOP & TRANSFORM

4%
TEACHING DESIGN & DEVELOPMENT

6%
COMPLEMENTARY ACTIVITIES

73%
OPERATIONS

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ACTIVITY TYPE BREAKDOWN COST

2020/21 - $698 MILLION, 6489 wFTE

Activity	%
Hybrid	14%
Non-...	37%
Transactional	49%

2021/22- $742 MILLION, 7097 wFTE

Activity	%
Hybrid	14%
Non-transactional	38%
Transactional	47%
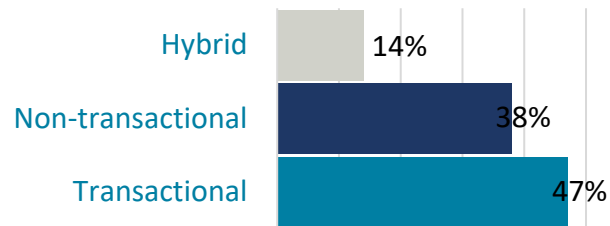
2022/23 - $772 MILLION, 7335 wFTE

Activity	%
Hybrid	16%
Non-transactional	39%
Transactional	45%
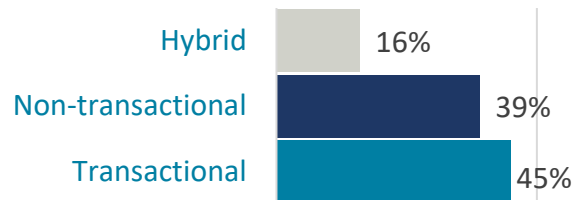
## 45% OF 2022/23 COSTS IS SPENT ON TRANSACTIONAL WORK

WHAT DO THESE RESULTS MEAN?

o Work focus is high on routine, process- driven activities.

o Inefficient processes mean transactional activities 'crowd out' the ability to devote time to non-transactional activities.

ACTIONS SOME UNIVERSITIES IN THE PROGRAM HAVE TAKEN

o Redesign processes for consistency & simplicity.

o Review policies to remove unnecessary steps, approvals etc.

o Clarify roles to remove duplicated effort.

o Systems implementations alone are not enough; they must go hand-in-hand with thoughtful, clearly-defined workflows.

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FUNCTION FOCUS

UofT HAS A HIGH PROPORTION OF GENERALISTS

39%
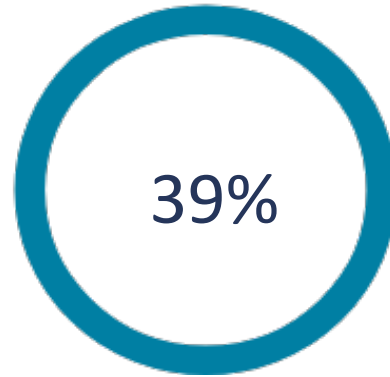
OF U of T's OPERATIONS CAPACITY IS IN GENERALIST ROLES THIS IS A DECREASE FROM **41%** IN 2021/22.

2020/21 – 42%
2018/19 – 40%

WHAT DO THESE RESULTS MEAN?

o 39% of staff are doing a wide range of activities.
o Effective if work is seasonal.
o Less effective if work requires some expertise.
o Limits ability for 'communities of practice' to form.
o Limits career paths for staff.
o Limits effectiveness of staff training investment.

## ACTIONS SOME UNIVERSITIES IN THE PROGRAM HAVE TAKEN

Redesign roles to:
o Increase focus where appropriate.
o Increase consistency of roles across organization.
o Improve understanding of competencies needed.

NORMALIZED OPERATIONAL COSTS

NORMALIZED COSTS AT UofT ARE 15% HIGHER THAN THE GLOBAL AVERAGE BUT ON PAR WITH ALL CANADIAN COMPARATORS. NORMALIZED COSTS HAVE RISEN BACK TO PRE-PANDEMIC LEVELS.

NORMALIZED COSTS – OPERATIONS – CAN U15 & *THE* TOP 100

Normalized cost, Robust reference model 3.1, 2017-2023

Legend: CAN U15, AUS Go8, UK RGC, 90Th

Notes:
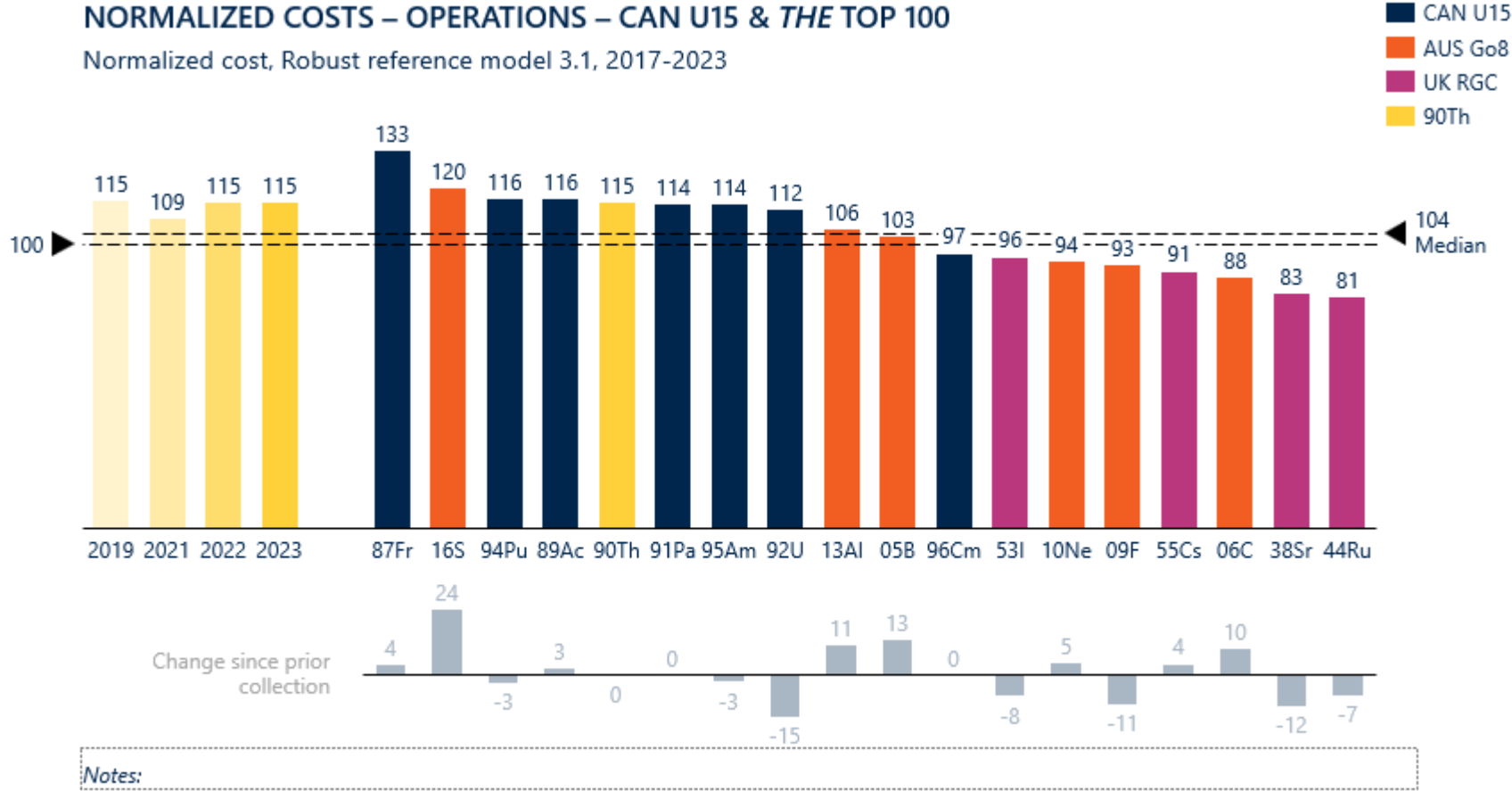
Source: UniForum Database November 2023; NousCubane analysis

NORMALIZED OPERATIONAL COSTS (FUNCTION)

NORMALIZED COSTS AT UofT ARE ABOVE AVERAGE FOR MANY FUNCTIONS.

FUNCTION NORMALIZED CAPACITY TRENDS

Normalized wFTE, Robust reference model 3.1, 2015-2023

Support Services	2023 (wFTE)	'19-'23 Chg.	2019 Norm	2023 Norm	'19-'23 Chg.	LQ**	Median CAN
Operations	7334.7	2%	118	125		90	123
Student Support & Services	1200.6	3%	122	132		92	154
Facilities Management (Ops)	1060.8	1%	172	168		91	133
External Engagement	1053.9	3%	120	133		87	126
General Administration	871.7	-2%	152	135		76	95
Governance & Institutional Mgmt. (Ops)	691.8	6%	63	77		91	118
Finance	550.5	1%	157	154		82	142
Information Technology (Ops)	525.4	2%	100	107		92	113
Human Resources	403.6	5%	135	157		102	131
Library	398.7	2%	146	151		74	158
Research Administration	329.1	13%	55	87	▲	97	125
Teaching Administration	248.4	5%	76	91		105	98
Develop & Transform	678.4	7%	58	74	▲	77	78
Change & Program Management (D&T)	300.5	11%	50	74	▲	81	84
Information Technology (D&T)	275.2	3%	67	74		75	85
Campus Transform. & Project Mgmt. (D&T)	102.8	6%	218	260		79	153
Teaching Design, Development & Delivery	482.2	-3%	92	79		89	125
Research Facilities & Support	1054.0	-4%	79	63	▼	79	208
Complementary Activities	841.4	-3%	545	470		77	176

Notes: * Arrows denote a university normalized wFTE change of +/- 5% for a specific function
        ** Lower Quartile of CAN U15 & The Higher Education Top 100 group of universities

Source: UniForum Database November 2023; NousCubane analysis

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TOP 10 TRANSACTIONAL ACTIVITIES CONTRIBUTING MOST TO UofT'S HIGHER COSTS

TOP 10 TRANSACTIONAL AREAS WHERE SPEND IS ABOVE THE LOWER QUARTILE - 90Th

Fn	Sub-function	Spend ($M)	19-23 Growth	Norm. Cost	Spend above Lower Quartile ($M)	% Central*	% Faculty*
FM	060.30 FM Maintenance and Local Requirements Management	47.7	-1%	143	17.6	56%	44%
GA	040.10 PA, EA & Receptions	42.3	-4%	133	15.1	24%	76%
FI	030.40 Accounts Payable/Receivable	16.0	-2%	357	12.4	29%	71%
FI	030.20 Financial Accounting & Reporting	19.7	3%	165	8.4	27%	73%
IT	050.80 IT Client Services - S&M	23.5	2%	100	7.5	38%	62%
IT	050.50 IT Infrastructure & Platforms - S&M	15.6	-2%	164	7.3	50%	50%
HR	020.10 Payroll & Benefits Services	11.4	3%	244	6.6	30%	70%
EE	070.50 Events Management	13.5	4%	179	6.4	23%	77%
FM	060.10 Property Services	33.3	-3%	117	5.2	74%	26%
SS	080.40 Student Financials & Scholarships	9.8	3%	187	5.0	45%	55%
	Transactional Top 10 Total	**232.8**			**91.3**		

Notes: * Arrows denote a material wFTE growth of +/- 10% within the organization category for a specific sub-function. Shading indicates the level of centralization, orange highlights values of 70% or higher while yellow highlights values between 30% and 70%.

Source: UniForum Database November 2023; NousCubane analysis

Operational Excellence Target: $50M over 5 years – *Goal Surpassed, 1 year early*

University Operations
$54 million cumulative savings
$1m+ efficiency projects:

Data Storage Solution	$13.5 m
MSB Retrofit	$5.1 m
Leasing Revenue	$4.5 m
Building Automation System Robarts	$3.2 m
Server Virtualization	$3.0 m
Managed Email Hosting	$2.5 m
Microsoft Campus Agreement	$2.3 m
Power Efficiency Savings OISE	$2.2 m
Enterprise Active Directory Service	$2.0 m
Power Efficiency Savings Data Centre	$1.5 m
My Research Application Virtualization	$1.2 m

OPEX: HOW WE ARE OPERATIONALIZING UNIFORUM & OTHER DATA

Overarching program goals

Improve Quality of Service Delivery

- Identify and address area of lower service delivery that is impacting our effectiveness

- Deliver service improvements to drive our academic mission

Deliver Services Cost Effectively

- Identify service/process/technology enhancements that deliver efficiencies

- Address fiscal pressures experienced across the institution

OpEx Advisory (2024-2025)

- Reviewed UniForum data

- Discussed successful initiatives at UofT and elsewhere:
  - Utility Reduction Revolving Fund ($2.5M annual savings)
  - Finance Modernization: Travel and Expense project (expect significant time savings; currently ~200 FTE)
  - TFoM IT Service Transformation
  - P&B Business Services Hub
  - OREP Finance Hub
  - Continuous Improvement program at UTM
  - UBC (process automation) and McMaster (finance) examples

- Evaluated potential back-office consolidation opportunities

OpEx 2.0 (Fall 2025)

- Begin work on concrete projects that will deliver service improvements, identify process and technology enhancements, and help address fiscal pressures

- Work to be carried out by a small staff team, in partnership with "client" units
  - Advised by a middle table of senior staff who will partner on specific projects
  - Sponsored by an academic leadership table

- Will engage shared services and academic divisions to identify high impact projects

- Will engage students in these projects, e.g., Engineering capstone teams