



October 14, 2016

PRESIDENT'S REPORT TO THE
FREDERICTON AND SAINT JOHN SENATES

An Exceptional and Transformative Student Experience

Experiential Learning – Provincial Task Force

All members of the task force have been appointed, including Robert Burroughs, from the New Brunswick Student Alliance and Roxanne Guerrette, President of the Student Council at UdeM. Laurelle LeVert, AVP, UNBSJ is the Task Force Chair. A Working Group has been appointed with six representatives from each of the four universities. These individuals have significant practical experience with Experiential Learning, including co-operative education, internships, community service, etc.

The Task Force has met with a number of interested parties, including representatives of

- NBCC and CCNB
- Nova Scotia Task Force on Experiential Learning
- Universities in Nova Scotia
- Memorial University of NL
- Jean Sauvageau, President, Federation of New Brunswick Faculty Associations

Additionally, contacts have been made with experts in BC, Ontario, NSERC, Waterloo University, Mohawk College and Opportunities NB (on cyber security). As the existence of the Task Force becomes known around the country, contacts are being made by those interested in learning more about our work.

A work plan, guided by the terms of reference, has been developed and approved. It contains nine action items that will be consolidated into an implementation plan. Each action item contains a short summary of the task, assigns a lead and other participants from the both the Task Force and the Working Group and provides a timeframe for the requested work to be completed.

The Task Force has been very active since its initiation. The work plan is comprehensive and in keeping with the mandate of the Task Force. The schedule is intended to have the Implementation Plan complete for presentation to the Sponsors (the 4 university presidents and PELT) in late fall.

Academic Planning

UNB's Academic Planning process needs to be presented in a multi-year framework, beginning with the work now completed by last year's LCCs, moving to our imminent next stage, and ultimately informing what will be our objective, two Campus Plans – one for each campus – that are representative of the unique cultures and programming on each campus, and a bi-campus Report which will all help to inform the work to be done on an updated UNB Strategic Plan.

The planning that takes place in 2016-2017 will map out our goals for our academic mission (teaching and research) so that UNB will remain as a leader among Canada's innovative post-secondary institutions in providing nationally-recognized,

comprehensive research and learning. Additional details can be found in Appendix A.

Student Recruitment

Student Recruitment set out to achieve a number of significant objectives in the past year and in the year ahead. Please see Appendix D for more information.

Sir Howard Douglas Scholars

Involvement in their university and community, plus excellent grades, has earned 17 University of New Brunswick students the distinction of being inducted into the Sir Howard Douglas Society. The award recipients volunteer their time and talent in a number of ways, both locally and internationally, and are all dean's list students.

Nominated by their faculties, the scholars must have completed at least two years of their bachelor's degree program, achieved academic excellence and actively participated in co-curricular or extracurricular activities.

Members of the Sir Howard Douglas Society have the opportunity to participate in special university events and become part of a network of outstanding students. As the honour society grows each year, new members will have the opportunity to meet and interact with past recipients of the Sir Howard Douglas Award.

Born in Scotland, Sir Howard Douglas served as lieutenant governor of New Brunswick from 1823 to 1831. During his term, he encouraged development, sought support for native peoples, improved communications and promoted education. Sir Howard was a founder and the first chancellor of King's College Fredericton, predecessor to UNB.

Established in 2006, the Sir Howard Douglas Society of Scholars has 204 members, including <http://blogs.unb.ca/newsroom/2016/09/27/sir-howard-douglas-scholars-inducted-at-the-university-of-new-brunswick/>.

Beijing Student Recruitment Office

The University of New Brunswick officially opened a student recruitment office on October 12, 2016 at the Canadian International School of Beijing in Beijing, China.

This is the only recruitment office in China held by an Atlantic Canadian university.

I was accompanied to Beijing by Dr. Robert MacKinnon, vice president, Saint John; Lloyd Henderson, associate vice-president, student recruitment and strategic enrolment management and Chris Beardsworth, director, international recruitment.

Premier Brian Gallant, a delegation from New Brunswick and officials from the Canadian Embassy also attended the opening.

The UNB Recruitment Office is housed in the Canadian International School of Beijing through the university's partnership with AKD Ltd., the parent company of the Concord College Network of Schools in China. The office consists of a single representative who is engaged as a consultant to UNB, providing information and materials on their behalf to students, parents, recruiting agencies and partners.

Currently, about 350 Chinese students are enrolled at UNB, making up 30 per cent of the international student population. More than 800 of UNB's living alumni came directly from China to study at the university.

UNB has a long history with educational institutions in China. The university was the first partner to the Concord Colleges of Sino-Canada, a partnership which is now in its 20th year. UNB has trained more than 100 students from Concord College in the past decade.

Dr. Francis Pang, chairman of Beijing Concord Colleges of Sino-Canada spoke at the event as well.

Building a Better University

Administrative Review

A report of the committee's observations, findings and recommendations has been completed and was submitted to me on September 16, 2016. It was circulated to the Board Audit and Finance Committees at their meetings in September and to the Board of Governors at its October meeting. A copy of the report can be found in Appendix B.

Strategic Partnerships

The strategic partnership initiative continues to focus on three major New Brunswick-based organizations with whom UNB has multiple touchpoints: J.D. Irving Limited; McCain Foods; and Irving Oil. Ongoing relationship-building and information-sharing efforts — both with the partners and among key stakeholders at UNB — have resulted in new collaborations and success in addressing concerns. On the R&D front, agreements have recently been executed with JDI and McCain Foods to advance collaborations with UNB researchers. Inroads are also being made toward the provision of professional development services by UNB's College of Extended Learning. All three partners continue to provide a variety of education enrichment activities for students, ranging from guest lectures to facility tours, as they look to connect with potential employees. The success of the strategic partnership initiative is due, in large part, to the commitment to the partnerships at the highest levels of UNB and the partner organizations. Ensuring these partnerships thrive supports several key university activities, not the least of which is fundraising.

It Begins Here Campaign

On Friday, November 18, UNB will publicly launch the It Begins Here campaign, the most ambitious in our history. Building on the success a decade ago of the Forging Our Futures Campaign, through which we raised \$87 million from the private sector, we are seeking to raise \$110 million entirely from alumni, friends, corporations and foundations. We do not expect the provincial government to play the role it has in previous campaigns.

This is a threshold, not a ceiling. For the past four years, through the "quiet phase" of the campaign, with the help of our dedicated co-chairs, David Ganong and Bob Quartermain, our distinguished Campaign Cabinet, and members of the Board of Governors, our advancement team has been working very hard to secure leadership gifts and pledges, not only to move us toward our goal but to lay the foundation for us to exceed it.

Fully one-half of the goal will be dedicated to student financial support, which continues to be a critical priority for attracting and retaining students, ensuring accessibility and rewarding academic achievement. The balance will strengthen our faculties, research centres and institutes; enhance our award-winning entrepreneurship programs; and provide more opportunities to our students for experiential learning--internships, study abroad and co-op programs.

Please plan to join us on November 18 as we celebrate our progress to date and, most important, the impact these contributions have had and are expected to have on UNB's capacity to provide an outstanding education, conduct world-class, cutting edge research, and meet our commitment to building a better New Brunswick, region and country.

The launch will take place simultaneously in Fredericton and Saint John by videoconference between the Wu Conference Centre and Ganong Hall Auditorium beginning at 9:30 a.m. Major gift announcements, student testimonials and plans for the remaining 18 months of the campaign will highlight the event.

'Why UNB' project

An update on strategy and tactics for year 2 of the 'Why UNB' project in all four priority areas of the UNB Marketing Office, including: the #OnlyHere recruitment marketing campaign, brand integration and longevity, unit and faculty support and digital initiatives can be found in Appendix C.

Mock Active Threat Scenario

Fredericton City Police, Fire, Dispatch, Emergency Management, Provincial EMO, Ambulance NB in coordination with UNB, used the AUC to conduct a multi-agency training exercise on Sept. 27. They were grateful for the site coordination by UNB as

this location provided them with the opportunity to conduct training with minimal impact on surrounding community in a building of significant size.

This event allowed UNB to test its Fredericton emergency mass notification system—ERMS. We were also able to demonstrate to City Police and Fire the extent and capability of UNB video surveillance and test our campus code blue phones.

The entire exercise lasted about 17 minutes from start to finish. Our communications effort seemed to pay off as people on campus and in the area seemed to be aware that there was a training session in place and respected the barricades. Media relayed information given to them, but did not show up. On social media, it was quiet except retweets of the city police.

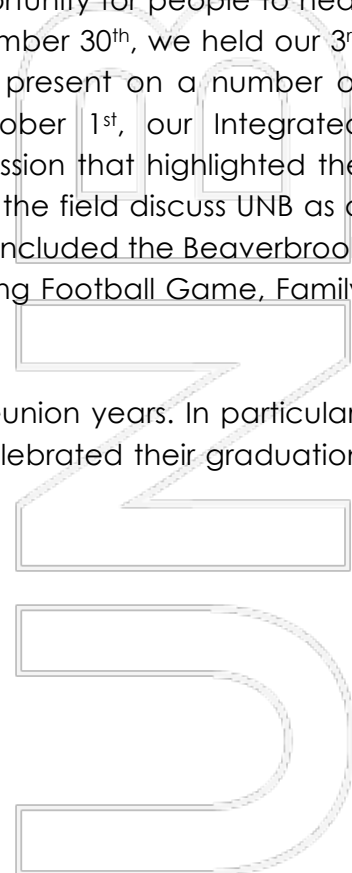
Building a Better Province

Alumni Engagement

The UNB Associated Alumni office held its annual Homecoming from September 29th to October 2nd. The 4-day event which is titled “Celebrate UNB” saw hundreds of alumni, faculty, staff and friends of UNB enjoy more than 40 different events that targeted all ages and affiliations.

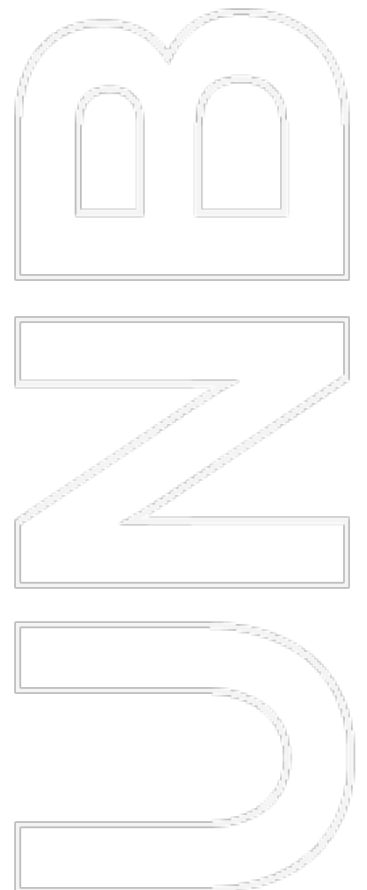
This year’s Homecoming provided several opportunities for alumni and the UNB community to hear about some of the exciting activities and research which is occurring on our campuses. On Thursday, September 29th, our Classes without Quizzes event saw Dr. Don Wright provide a lecture entitled “Trump, Clinton and the American Political Tradition” – it provided an opportunity for people to hear from a UNB expert on a very timely and interesting topic. On Friday, September 30th, we held our 3rd annual Research Showcase which saw three groups of UNB researchers present on a number of different topics to Homecoming attendees. Finally, on Saturday, October 1st, our Integrated Technology Services and Faculty of Computer Science held a morning session that highlighted the history of UNB’s IT development and a panel discussion that saw experts in the field discuss UNB as a Centre for Cybersecurity Research and Talent Development. Other events included the Beaverbrook Scholars dinner, traditional Lobster Dinner, Senior Classes Diner, Homecoming Football Game, Family FunFest and a Tasting event.

The Homecoming weekend saw a strong turnout of alumni from several reunion years. In particular, alumni from the 1956, 1961, 1966 and 1976 reunion years attended and celebrated their graduation anniversaries.



APPENDIX A

Academic Planning



Academic Planning

Placed in comparison to other universities' efforts at academic planning across Canada, the UNB process in 2015-2016 should be rightly considered a success. The Local Campus Committees and their procedures emerged from a consensus agreement at Senates regarding representation, mandate, and communications. Significantly, the engagement of a large number of faculty members from across the campuses was crucial in both the success of the endeavor, as well as the ongoing interest and commitment by faculty in the next stages of academic planning.

It is our intention to use the 2015-2016 academic planning process, which presented assessments of all academic units (in the form of Local Campus Committee Reports), as a basis for the next phase of academic planning, which will involve the preparation of academic plans for each campus, and an assessment/report for bi-campus opportunities for collaboration between the campuses. This process could identify possibilities such as: potential merging of units, redeployment of academic resources, and improved use of teaching and research activities. It is clear, however, that the process to achieve such recommendations needs to continue to actively involve our academic community.

At their September and October meetings, the Academic Planning Committee (Fredericton) and Academic Planning & Resources Committee (Saint John) discussed next steps regarding the academic plan, specifically focusing on opportunities for bi-campus co-operation. After discussion about how this process might work, the Committees identified a number of factors that could help highlight opportunities for different types of collaboration, such as interdisciplinary program opportunities, research opportunities, bi-campus teaching opportunities for graduate and undergraduate programs, knowledge transfer, and the potential redeployment of resources to support these opportunities. All of these in light of the President's three challenges of 1) becoming a research powerhouse, 2) becoming more sustainable and 3) having a transformative student experience.

The Committees also considered at length the types of cross-campus structure that might best serve this process. It was noted that the mandates of the Academic Planning and Academic Planning & Resources Committees include academic planning. In response to the President's September 2014 letter to the Senates seeking a bi-campus transformation committee to look for collaborative opportunities after the work of the LCCs were complete, Committee members on both campuses agreed that these two committees could fulfill both roles and work together to identify these types of opportunities. At their respective meetings, then, both Committees passed motions to the effect that they would request that units on both campuses provide an opportunities analysis for their programs using the two LCC Reports, updated budget information, and feedback regarding the opportunities outlined in the paragraph above, and then report to the respective Committee. The two Committees would work together to create a joint report to be submitted to the two UNB Senates.

We have moved our budget discussions to earlier in the year to allow for broader input in the process; a concurrent move to new academic planning committees making resource recommendations allows us to develop our budget for 2017-2018 while considering our near- and longer-term goals for resource implications on Departments and Faculties.

We envision mutually agreed upon milestones for the coming year, including a mid-term review (likely early in the new year) that will evaluate the academic planning work at that point and set out objectives for the

final reports of the Committees. Succinctly, we envision that the following activities will take place in the coming year:

All units will receive the LCC reports from both campuses to support their efforts to continue with academic planning. Each Campus will determine its own procedures by which to facilitate this next phase of planning.

The Saint John Campus Academic Plan:

On the Saint John Campus, at its October meeting, AP&R supported the creation of three Faculty Academic Planning & Resource Committees. The Deans will chair these committees which will have a common terms of reference and mandate; however, membership may vary slightly to accommodate the unique characteristics of each faculty. These committees will need to ensure that in addition to academic programming, research opportunities are fully considered. The VPR will assist units as needed in these discussions.

These Faculty AP&R Committees will prepare a submission to the Saint John Senate AP&R Committee identifying short, medium and long term plans with respect to their academic programs. This will include broad consultation within their Faculties.

The AP&R Committee will review the three submissions, and use these to form an Academic Plan for the Saint John Campus. The SJ Academic Plan when finalized by AP&R will be submitted to the Saint John Senate and BOG.

The Fredericton Campus Academic Plan:

At its September meeting, the Fredericton Senate Academic Planning Committee considered a committee structure to facilitate the upcoming round of planning. It was considered essential that a collegial approach be undertaken; given the mandate of the APC, it was agreed that a transparent process that sought unit-level feedback would be effective.

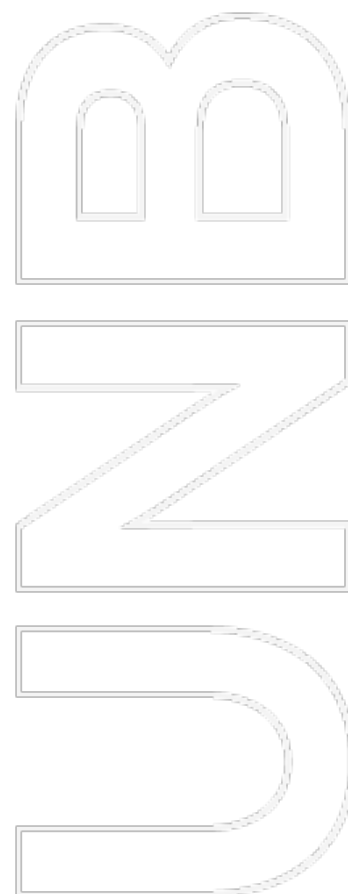
The APC agreed that units would receive the LCC reports from both campuses to consider collaborative or co-operative opportunities, focusing specifically on interdisciplinary program opportunities, research opportunities (working with the VPR), bi-campus teaching opportunities for graduate and undergraduate programs, knowledge transfer, and the potential redeployment of resources to support these opportunities. Fredericton units will create reports identifying opportunities in the categories outlined above to be submitted to the Academic Planning Committee on the Fredericton campus, which will consider options in discussions with the Saint John AP&R Committee.

The APC will prepare a submission to the Fredericton Senate that will consider both short term and longer-term plans for academic planning. Where issues may have a University-wide implication, the APC will work with AP&R to make recommendations for both Senates.

The Bi-campus Collaboration Document:

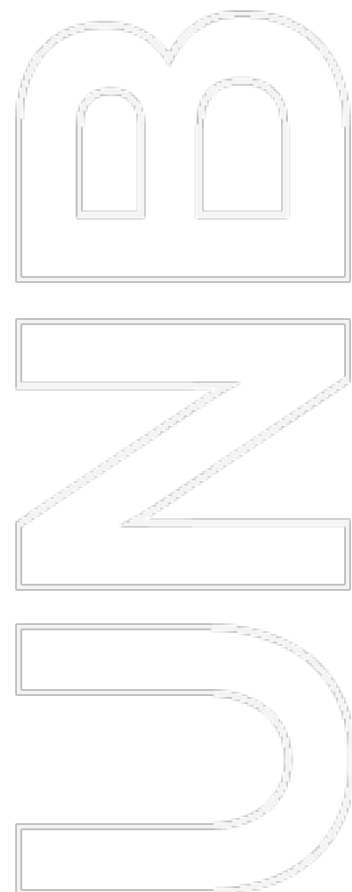
The Academic Planning and Academic Planning & Resources Committees will work together to produce a bi-campus report that will highlight the collaborative and co-operative opportunities on both campuses, taking into consideration the two campus Academic Plans, and other relevant feedback provided to these two committees.

University-wide consultation will take place, and the feedback will be reviewed by the APC and AP&R committees working together. The Final Report will be submitted to the Senates, and subsequently to the BOG.



APPENDIX B

Administrative Review Report



**University of New Brunswick
Joint Audit/Finance Committee
Administrative Review Report**

Background

The Administrative Review Task Force (ARTF) was established by the President in September, 2015 with a mandate to review the University administrative units and processes to ensure effectiveness and efficiency across all units and ensure all units support the mission and strategic direction of the University.

The ARTF was comprised of the VP (Administration and Finance) as Chair and representatives from faculty and staff across both campuses. The scope of operations to review was extensive so the task force agreed to have the Student Services units on both campuses reviewed by a separate committee and limited the review of the remainder to those functions which exist on both campuses. No external consultants were hired.

Summary of Results

The main recommendations are as follows:

Recommendation	Action
1. Seek opportunities to combine senior management roles.	Hire a consultant to review UNB's organizational structure and recommend changes
2. Explore and implement opportunities to use technology more efficiently	Project FOCUS has already been started. Continue with this project
3. Simplify the Travel Policy	Subcommittee established – set a deadline for recommendations. Seek automation improvements through Project FOCUS
4. Formalize Quality Assurance Reviews for Administrative units	VP(Administration and Finance) to develop a QAR process for administrative units
5. Improve employee orientation	This was also identified at the senior leadership retreat and is to be coordinated by the Human Resources and Organizational Development department
6. Create a one-stop shop for services in one location – particularly students	Establish a working group to investigate the feasibility of creating a Service UNB model
7. Review the IT Tier 1 support model on the Fredericton campus to determine if another model would be more effective	The ITS department undertake a study to review and analyze various Tier 1 Support models and determine the optimal model
8. Review the budget models in Facilities Management including chargeback models for services	The Resource Planning and Budgeting team undertake a review of the budget and chargeback models in the Facilities Management department



Administrative Review Task Force Report

July 2016

Karen Cunningham, Chair
Lesley Balcom
Shirley Cleave
Melissa Dawe
Janice El-Bayoumi
Ana Espejo
Joanna Everitt
Heather Finkle
Cindy Flann
Ali Ghorbani
Terry Nikkel
Cliff Shaw
Mark Warren

Mandate and Membership

The President directed an Administrative Review Task Force (ARTF) be formed in September of 2015 with a mandate to review the University administrative units and processes to ensure effectiveness and efficiency across all units and ensure units support the mission and strategic direction of the University. The VP Administration and Finance was appointed Chair of the Task Force with the membership to be as follows:

Faculty representative (UNBF)	C. Shaw
Faculty representative (UNBSJ)	J. Everitt
Academic Dean (nominated by Admin)	A. Ghorbani
AVP Learning Environment	S. Cleave
Director, ORS	K. Ashfield (A. Espejo)
Director, Financial Services	C. Flann
Director, Finance and Administration (UNBSJ)	H. Finkle
Director, University Budgets	M. Warren
AVP, ITS	T. Nikkel
Libraries	L. Balcom

Scope and Approach

The task force held its first meeting on October 5, 2015 to determine the scope of the review and formulate an approach. The task force quickly realized the breadth of administrative units was very large and some parameters were required. Administrative units within academic faculties and the Libraries were excluded as they were understood to be part of the academic review (LCC) process. In addition, it was decided that Student Services units on each campus would be reviewed separately by the AVP (Learning Environment) and AVP (Saint John). Despite the diversity and complexity of operations identified, the task force members decided that the review (at least this phase) should be done internally and that no consultant was required. In order to keep the scope reasonable, the task force decided to limit this phase of the review to those units that had operations on both campuses in an effort to find efficiencies or organizational changes that could yield the biggest benefit.

The task force decided that given the very broad scope and varied operations, it would commence with a self-assessment survey completed by each unit that would help the task force identify areas of focus. The survey is found in *Appendix 1* addressed unit organization structure, budget, purpose, accomplishments, functions involving other units, opportunities for cost savings, service enhancement, efficiencies, and functions that could be cut or reduced. It

also requested analysis of the unit's strengths and weaknesses. A list of the units surveyed is found in *Appendix 2*. Once the responses were received, two task force members were assigned to review each response in more depth, interview unit staff/directors, and report to the task force with key recommendations for improvement and areas requiring further investigation.

These reports were reviewed and discussed with the task force over several meetings in the spring of 2016. A summary of the recommendations and unit responses is included in *Appendix 3*. The major findings are summarized into themes and outlined in the next section of the report.

Major Findings and Recommendations

Organization

Of the units examined in more detail, the task force found very little duplication of effort between the campuses. Most services are required on each campus and, in many instances, processes are already in place to streamline efforts and reduce duplication. For example, "on the ground" service is required on each campus in the areas of facilities management, student services, registrar's office, financial services and IT support. These are service areas and personnel are required for service delivery.

However, there may be opportunities to improve consistency across the campuses and to reduce administrative oversight responsibilities by having bi-campus oversight/management of certain functions. This model works effectively in many instances, and could be expanded. This would involve changes to the organizational structure, and would require full consultation and analysis, including analysis from a budgeting perspective. The ARTF considered this to be a major project in itself and would require considerable review and consultation and, as such, specific recommendations were beyond the mandate of the ARTF. However, consideration should be given to combining senior management roles to provide a more streamlined organizational structure and all the University to reflect the One University, Two Campuses model. There may be opportunity to streamline the oversight and administration of some functions by having a common oversight. With the recent retirement of the Assistant Vice-President Financial and Administrative Services in SJ, for example, the responsibility for oversight of capital planning and major capital projects was transferred to the Associate Vice-President (Capital Planning and Property Development), although day-to-day management remains with staff on the SJ campus.

The Committee recommends senior management seek opportunities to bring like functions on each campus under a single unit with bi-campus responsibilities.

Process and Technology

A recurring theme heard throughout the review from the areas surveyed was the need for streamlining and updating the processes involving Colleague [the Enterprise Resource Planning,

(ERP) system used by the University]. A list of the items in this category is found in *Appendix 4*. This list includes, but is not limited to:

- Automated workflows including electronic approval;
- Electronic integration of course calendar with Senate Curriculum Committees and UNB Calendar;
- Increase self-serve opportunities for students, faculty and staff (e.g. student confirmation of enrolment letters);
- Electronic travel expense claim processing.

Many of these initiatives are dependent on an upgrade of Colleague – both a technical and functional overhaul. This is a significant undertaking and, to that end, the University has launched Project FOCUS, a multi-year, multi-project program designed to modernize our ERP and provide a central governance to ongoing improvement and development.

The concurrently running Project FOCUS is viewed by the Task Force as a significant, positive initiative that provides a solid, well governed vehicle for vetting and prioritizing the various improvement items contained in Appendix 1. By including these items in the project mandate, we ensure an integrated approach guided by common principles that are aimed at improving efficiency.

The ARTF recommends these initiatives be included in the Project FOCUS mandate and implemented on a schedule that considers the priorities the Task Force has identified but also that fits with the overall Project FOCUS schedule.

Some Task Force members felt that the processing of travel claims is particularly inefficient and cumbersome. Staff from Financial Services reported they process over 15,000 travel claims per year (approximately 14,000 in Fredericton and 1,300 in Saint John) and reported a large number of errors in claims that cause delays and inefficiencies. In light of these findings, the Task Force created a sub-committee to examine the issue in more depth and return with recommendations. The sub-committee has met a few times to date and reports two key initial recommendations:

1. Simplify the UNB Travel Policy
2. Implement an electronic travel claim system

The sub-committee will continue to meet and will propose simplifications to the UNB Travel Policy. The implementation of an electronic travel claim system has been passed on to the Project FOCUS Steering Committee as a priority. In the interim, the sub-committee recommends developing form fillable claim forms that include drop-down boxes for common items such as meal rates and mandatory fields to reduce errors and decrease completion time.

Quality Assurance Review Process

The ARTF identified that there is no regular quality assurance review process in place for administrative units as exists for academic units. The QA process for academic programs is mandated by the MPHEC and is carried out on a cyclical basis covering all academic programs.

The Task Force noted that most, if not all, administrative units practice a process of continuous improvement to some extent. Some recent initiatives include:

- Saint John campus combination of student-facing service desk functions for payments and Registrar services;
- Financial Services implementation of web-time entry for part-time staff and the ability for staff to receive their T4 slips on-line through e-services;
- Registrar's offices are in the early phase of implementing document imaging of admissions records;
- The College of Extended Learning is in the process of implementing customer relationship management software to assist with managing the myriad of on-line and professional course offerings and enrolled students;
- ITS implemented the VOIP phone system in 2013. This initiative was university-wide, replacing most (95%) land lines and resulted in savings to the University of \$500,000 annually (\$2 million since VOIP was implemented in 2013);
- Residence Life, Campus and Conference Services and Student Affairs (UNBF) and Services was reorganized to form the new Student Services Department resulting in cost savings from the restructuring which included the elimination of outsourced resources, elimination of a position and sharing of positions. The new structure also improves effectiveness by facilitating collaboration with and among divisions.

Several unit heads stated that one of the biggest obstacles to process improvement is the lack of resources to plan and implement changes. A series of budget reductions over the last ten years, combined with an increasingly complex environment and more regulatory requirements, has resulted in a lean workforce with very little excess capacity to implement process improvement changes. Despite the resource constraints, many departments have been able to accomplish improvement projects – a few of these were mentioned earlier. These types of initiatives have become increasingly difficult to initiate as Significant change is hard to initiate as staff are fully occupied fulfilling their day-to-day responsibilities.

The ARTF heard that in ITS, a position was created with responsibility for Quality Assurance and Process Improvement. This type of central coordination has enabled ITS to identify and complete many improvement processes and projects.

In 2009, a document prescribing a Quality Assurance Program for non-academic and support units was drafted but never adopted by the University. A schedule to review many non-academic units was prepared and several reviews were completed but the program was never approved and officially adopted. No reviews have been completed under this umbrella since at

The process proposed in 2009 followed a very similar model to that used to review the academic programs with the Program Review Committee (PRC) assuming responsibility to oversee the review process of non-academic units. The process was to mirror that used for academic units. (Note the PRC is comprised of 10 Senate appointments across both campuses, 4 students, the VPA (F), VP SJ, and the Dean of School of Graduate Studies.

The Task Force believes a different approach is required to review administrative units. These units are vastly different from one another and require knowledge about the norms in each area to evaluate them. The Task Force recommends the Vice-President (Administration and Finance) develop a regularized QA Process Improvement process for the University. This should be run out of the VP (A&F) office with an individual responsible for oversight of the process. Consideration should be given to adopting a program such as Lean Six Sigma for administrative reviews. The Task Force recognizes this will require resources, both to train staff in the methodology and to oversee the process. Options to redeploy an existing resource to this function should be explored. Reviews of all administrative units and processes should be done on a cyclical basis. In order to get optimum benefit from the reviews, a system to follow up and report on progress with respect to implementation of recommendations from past reviews is essential.

Adequate Procedure Documentation and Employee Orientation

Another thing that became evident, not only through discussions with the areas being reviewed, but also through discussions with ARTF members, is that times inefficiencies occur because staff do not know who to call in certain circumstances or who/what unit is responsible for certain functions. The task force considered this to be a significant issue, and noted the University does not do a good job of on-boarding and training new employees. Documentation does not exist explaining the roles and responsibilities of each unit or even how to complete basic administrative tasks. The result is that sometimes required administrative tasks (e.g., completing and submitting a time sheet or hiring request) do not get done on time and are not completed accurately. This results in non-standard treatment of the transaction (e.g. “rush”) by the unit providing the service which is costly and inefficient.

The task force heard there are some orientation efforts in place on the campuses, however these are not comprehensive and not directed to all employees. The task force recommends a coordinated approach to developing procedural and orientation materials for employees. One use of the materials will be for on-boarding new employees or assisting employees who take on new roles. Some examples of things to include in such a document are:

- Hiring process – forms, who to contact
- Purchasing process – furniture, supplies, services (summary of the rules)
- Purchase card – eligibility, how to order one, rules around use
- How to complete a travel claim
- Tri-council and research guidelines/process – who to call for assistance

- Purchase card – eligibility, how to order one, rules around use
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The responsibility for coordinating on-onboarding and orientation activities and materials should be assumed by Human Resources and Organizational Development.

Organization

Over the course of the review, it became evident that the University has evolved in silos and that as regulations and requirements have changed, the organization has not always changed with it. For example, in Fredericton when a student arrives on campus, they may need to pay their fees at Financial Services, get their ID card at the UCard Office, pay for a parking pass at Security, finalize registration at the Registrar’s Office and possibly make an appointment with Student Aid if support is required. This is seen as inefficient and unwelcoming by students arriving on campus.

The ARTF recommends moving these functions to a single location. It would not only create a “one-stop shopping” for students but could offer opportunities for efficiencies in staff deployment, including more ability for cross training to backfill and cover off vacations. There are a number of logistical considerations to review, including space requirements and the need for a triage process to manage long lines.

The model described above could be the beginning of a “Service UNB” model where we would provide a full array of outward facing customer services in a single location (on each campus). The Task Force believes this would be a benefit to students and the public but would require more analysis and an implementation plan. Other outward facing service areas include: URec, Conference Services, Athletic Facility Booking and Summer camp registration (various departments).

Specific Service Areas

Tier 1 (Level 1) IT Support

One area where a difference in service delivery between the campuses came to light is the area of desktop computing (Tier 1) support. In Saint John, Tier 1 support is provided by centrally trained and managed resources but in Fredericton there are three possibilities:

1. Some units contract with ITS to provide Tier 1 support;
2. Some employ their own resources to provide the support;
3. Some have no support so it presumably falls to staff members who are actually employed for other purposes.

A prime reason for the difference is where the resources are budgeted. On the SJ campus, the budget and support responsibility are controlled centrally. On the Fredericton campus, each unit controls the resources and makes the decision about Tier 1 support.

The task force identified this as a significant concern both from an efficiency perspective (there is so much reliance on technology that having adequate IT support is a critical factor to maintaining ongoing operations) including serious considerations from a security perspective. There are daily threats to the University networks and inconsistent set up and maintenance of desktop computers can expose the University unnecessarily.

The Task Force believes IT desktop (Tier 1) support is a basic service and should be offered consistently across both campuses. While resources can be housed in various locations to provide faster service, the individuals delivering the service should be trained and supervised from one unit on each campus. The standards for set up should be consistent between campuses as well to help ensure standardized and secure desktop set ups and allow for near seamless backfilling of Tier 1 support people out on various forms of leave.

The Task Force recommends a study be undertaken to investigate the most cost effective and efficient way to deliver Tier 1 Support to all units on campus that ensures high security and functionality standards are maintained. Any solution would need to ensure existing support levels are maintained or exceeded.

We recommend a study be led by ITS in conjunction with a Dean and Director from each campus, and an RPB resource and brought forward to PET for decision.

Facilities Management – Fredericton

It became evident from the number of questions from Task Force members that the methods used by Facilities Management (Fredericton) to budget and estimate jobs are not well understood across the campus. Despite attempts by Facilities Management to explain the process and model, most Task Force members remain unclear as to why estimates for painting, lock changes, data drops and other relatively straight forward jobs appear to be in excess of market rates. This perception of high service cost has led to some individuals seeking to contract externally for work which may not be the most cost effective option for the University overall.

The Task Force had additional questions about the criteria for determining what constitutes regular maintenance in buildings (included in FM budget) versus cosmetic maintenance (paid for by the requesting unit). The Facilities Management base budget provides for routine building maintenance (per website) but “routine building maintenance” is not defined anywhere. The website states, for example, that: “Unless the requested (paint) work is part of the normal building decorating cycle or is necessary due to normal wear and tear, the department will be charged for requesting painting services.” However, there is no decorating cycle posted on the website nor in any budget documents so the campus community has no way to know when their area will come up maintenance and renewal cycle.

The concern of the Task Force is that absent a definition of routine building maintenance and a cycle for carrying out such maintenance, UNB buildings are vulnerable to falling into disrepair. Alternately, individual units with available resources may contract to have regular maintenance

done, thereby effectively jumping the queue resulting in maintenance being done based on the ability to pay rather than need. Given limited human resource capacity in Facilities Management, this could result in disruption in the routine maintenance cycle so that needs in some areas are not addressed. There is a perception that some administrative units are able to have regular maintenance done on a more frequent basis than many academic units.

The Task Force team assigned to review Facilities Management were unable to do a thorough review of the Facilities Management operation given its vast scope and also the nature of the work. It was felt some expertise in the field was required to perform a proper review. Facilities Management staff stated in their reply to the reviewers that the current model has been in place for 30+ years and has served the University well. However, funding levels have changed and deferred maintenance of the University's assets has become more of an issue today. A recent review by Sightlines indicated the University is not dedicating enough in its annual budget to keep up with required maintenance. This is bound to have an impact on resource allocation decisions in Facilities Management.

The Task Force therefore recommends the Vice President (Administration and Finance) and Facilities Management jointly initiate a review of the budget models used by Facilities Management on both campuses, including the level of base funding and services funded through chargebacks. This should include a review of the chargeback rates. The results of the review must be shared with the wider UNB community in an effort to enhance transparency and help the community understand the value provided by the Facilities Management operations to the campuses.

University of New Brunswick

**Administrative Program Review
Self-Study Survey**

Introduction and Purpose

The University of New Brunswick is committed to excellence in academic and administrative programs. As a result, President Campbell, in support of the University's Mission, has initiated a review of all Academic and Administrative Departments. For the purposes of the Administrative Program Review, an Administrative Review Task Force (ARTF), led by Karen Cunningham, Vice President Administration and Finance, has been formed to review administrative departments to ensure resources are being used in the most effective and efficient manner, and to seek ways to improve the effectiveness and efficiency of administration, organization, and services.

As part of this review, departments are required to complete a self-study that includes a critical analysis of the current state of the unit, identification of specific issues that are critical to the further improvement of the unit, and the fundamental questions that should drive strategic planning for the unit. The study will be submitted to the ARTF as a written report and will provide a foundation for subsequent review by the Task Force.

The ARTF will review the report and meet with the managers of the unit to gain further insight into the state of the unit and discuss key issues. A final report with recommendations will be prepared by the ARTF for submission to the President in the spring of 2016.

Goals of the Administrative Program Review

1. Ensure alignment of all UNB administrative units with the Mission and Strategic direction of the University
2. Ensure effective and efficient use of all University resources
3. Improve and enhance programs and services
4. Promote excellence and quality in all administrative support units
5. Reduce/eliminate unnecessary duplication and redundancy.

Please complete the following Self-study with key members of your staff and submit to Cathy Mahboob, Office of VP Administration and Finance, SHDH, 3 Bailey Drive, Room 112 by **Friday, December 11, 2015**.

University of New Brunswick
Administrative Program Review

Administrative Self Study

Administrative Unit Phone Email	Team members completing the survey	Date Submitted
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1. Structure, Mission and Responsibilities

What is the Mission of the Unit?	
What are the Unit's Key Responsibilities/Functions (Attach Organizational Chart)	
Describe the functions of each area in your unit focusing on how the managers enhance delivery of the service they manage	
How does the unit support: <ul style="list-style-type: none">- The University's Strategic Plan- The Academic mission of the University- The Research mission of the University	

2. Quantitative Measures
Entire Unit

Annual Budget last 5 years		Non-salary Budget last 5 years		Major uses of non-salary funds
2015-16		2015-16		
2014-15		2014-15		
2013-14		2013-14		
2012-13		2012-13		
2011-12		2011-12		

Salary budget last 5 years	# FTE's last 5 years		On base funding	On soft money - identify source	
	2015-16	2015-16			
2014-15	2014-15				
2013-14	2013-14				
2012-13	2012-13				
2011-12	2011-12				

Functional Area (for each functional area of the unit, please provide the following information)

eg. Within Financial Services there are the functional areas of Student Accounts and Accounts Payable. Processes within Accounts Payable include Invoices and Travel/Expense Claims

Functional area: _____

*Process name	Description	Identify main "customers"

*Process – within a functional area, there may be multiple process or responsibilities. To help us understand the operations of the unit, please provide details about each responsibility.

Functional area

Have benchmarks been established for various metrics?

Measures/metrics to measure volume or workload and performance

	Actual	Benchmark

If you do not currently use benchmarks to assess the performance of your unit, please provide examples of benchmarks you believe would be useful in assessing your unit.

Provide examples of how the unit has improved performance and indicate if this improvement benefited the unit itself, the customers of the unit or other unit(s) within the university.

What are the unit's most notable accomplishments in the past 3 years?

3. Cross Unit Functions *(Attach additional pages if needed)*

<p>Does your unit interact with other units to provide or deliver a service? If yes, identify the functions that exist between the units.</p>	
<p>Are there opportunities to combine these services to create a more efficient delivery?</p>	

4. Opportunity

<p>Are there activities and functions that should be strengthened, abandoned or transferred? If transferred, to whom?</p>	
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<p>Please provide details of any opportunities you are aware of to increase the efficiency of service delivery of functions provided by your unit (eg. Automation, streamlining between units, outsourcing).</p>	

**Administrative Review – Units and Processes - For Review
November 2, 2015**

Units

- Financial Services – UNBF & UNBSJ
- VP Academic/VP Saint John
- ITS/ISS
- Facilities Management – UNBF & UNBSJ
- Human Resources
- Security and Traffic – UNBF and UNBSJ
- Registrar
- Recruitment
- CEL
- Saint John College
- Budget Offices
- Capital Planning
- Marketing
- Communications
- ORS – Admin component
- Secretariat
- President’s Office
- VP Administration and Finance
- VP Research
- Development and Donor Relations
- VP Advancement
- Risk Management
- Trust and Treasury
- Human Rights Office
- URec
- Athletics



**Administrative Review Task Force
Recommendations and Unit Responses**

**Facilities Management - UNBF
Administrative Review
Summary of Recommendations/Opportunities**

Opportunities and Recommendations

Recommendation # 1 – Review of Management Structure – Use industry standards at other universities

Response:

It would be helpful to know which specific industry standards the reviewers are referring.

UNB-F has long been an active member in the international association APPA (Leadership in Educational Facilities) having several staff that are enrolled in, or graduated from APPA's Institute for Facilities Management and Leadership Academy. Currently there are UNBF FM managers serving on the Board of Directors of the APPA association at the chapter level (NB, NS, PEI, NF and Labrador) and regional level (Ontario, Quebec, Newfoundland and Labrador, Prince Edward Island, New Brunswick and Nova Scotia, Washington DC, Maryland, Delaware, Pennsylvania, New Jersey, New York, Connecticut, Rhode Island, Massachusetts, Vermont, New Hampshire and Maine). Additionally, as much as financially feasible, FM staff at various levels participates in the educational opportunities offered at both the local chapter and regional annual conferences. This level of involvement avails UNB-F FM to a vast amount of research and education opportunities specific to facilities management. In terms of organizational structure of FM units, APPA recommends facilities organizations be structured based on the functional areas, being: Operations and Maintenance; Project Design and Construction; and Administration. Based on size and specific duties, Energy and Utilities is typically a sub-function of Operations and Maintenance, or its own functional area. UNB-F FM follows this exact, internationally endorsed management structure. Therefore FM does not understand the rationale or basis of this recommendation. FM is employing well-researched industry standards, something that may have come to light for the reviewers had they engaged in dialogue with the department.

Recommendation # 2 - Increased transparency on how FM budgets are developed

Response:

The responsibility to ensure transparency of the budget process rests with UNB's VP-Finance and Administration. Notwithstanding, on several occasions, FM has accepted invitations to make presentations to the Dean's Council and the Director's Plus groups on a variety of topics, including the budget structure. FM is always pleased to take advantage of these presentation opportunities. During the most recent budget process FM made a presentation to the Fredericton Campus Budget Committee that included a solid representation from a variety of University stakeholders. One would assume it is the responsibility of these representatives to disseminate appropriate information back to their constituents.

Further to this, in an attempt to provide clarity to the general University community on the unit's financial structure, UNB-F FM has detailed on our website "*Which Services are Billable?*"

<http://www.unb.ca/fredericton/fm/requests/billable.html>

Consequently, FM is of the opinion the unit itself has made solid attempts to address this priority, both on its own and in supporting University senior administration who have provided opportunities and venues for stakeholders to understand FM's budget structure.

Recommendation # 3 - Discussion of chemical management with academic units and Health & Safety Unit - rationalization possible

Response:

The management and administration of chemical management for the University does not reside within FM. Melissa Dawe is the point person for the University.

Consequently, FM does not understand the intent, or issue to be resolved, with this recommendation. Dialogue with the reviewers would have been helpful in understanding this recommendation.

Recommendation # 4 - Review workloads of staff as a means of understanding the structure in FM and workload

Response:

FM clearly understands the workload and structure of its staff. As mentioned above, the unit is organized in a fashion recommended by international experts in the facilities management field. As explained in the initial survey *"With each position vacancy we explore options as to where that FTE would benefit the University the most."* This is indicative of FM's constant review of workload. Detail of every FTE within FM has been previously provided in the written response to written follow-up questions posed by the reviewers. Again this should have demonstrated FM reviews the workload of our staff and understands the structure of our organization.

Recommendation # 5 - Increase transparency of quoting process - itemized, detailed quotes – for transparency and education for users

Response:

FM is a service unit within the University funded by operating budget and cost recovery. At every opportunity FM stresses the fact of not being in the position to provide quotes. A private sector business operating for the purpose of generating profit can provide quotes as they are in a position to assume the risk should actual costs exceed the quote. Conversely, FM provides budget estimates, and only the actual costs for the project, be they more or less than the estimate, are recovered.

The more detailed the estimate, the more resources required in the preparation. It should be noted, in the 2015-16 fiscal year, FM utilized \$92,894 in staff time preparing estimates for the University community; this exceeded the \$90,000 for this purpose included in our base salary funding. As with all other units, FM is responsible for negative salary carry-forwards. Therefore FM absorbed this overage as the provision of estimates is provided at no cost to the requestor. As anyone, at any time, can request a budget estimate for any project, it is not good use of the university resources to itemize detail further than what is currently provided.

Again, this too is an item addressed at almost every University presentation FM makes.

FM also provides some basic information on its website. Please see:

<http://www.unb.ca/fredericton/fm/construction/estimates.html>

FM is always willing to discuss and explain the estimate and quoting process with our colleagues.

Particularly in larger projects, the tendering process can be specific and detailed, but the best interest of the University is protected and represented through trained professionals in both Procurement and FM. FM is concerned by the persistent lack of trust and skepticism articulated by colleagues on campus towards FM in this regard. One often wonders if the motivation for such skepticism is a lack of understanding, or rather an unwillingness to accept the reality that the resources required to build and maintain the University's physical assets far exceed those required in a domestic residence - the parallel that is often attempted to be made to FM as an argument against a particular estimate.

FM has always been transparent with the quoting process and follows all University and provincial policies; to suggest otherwise is disparaging. The professionals within FM do not fully understand the intense rigor and skill required by its esteemed academic colleagues in the development and delivery of academic programming, but would never suggest a lack of transparency of the process.

FM would disagree further effort should be expensed on this recommendation. Perhaps a clearer stronger endorsement from senior administration of the competency of FM would be helpful in addressing this recommendation.

5 (a) Detailed explanation of the project management fee – as a means to educate users and provide transparency

To set a context which may be helpful, FM provides a brief overview on their website of the role of Project Management within the FM unit:

<http://www.unb.ca/fredericton/fm/construction/index.html>

As all UNB units endeavor to stretch limited operating and special one-time funding, the project management fee is often viewed as an expense only, failing to recognize the value in cost containment, quality assurance and regulatory compliance this function provides.

The project management team primarily exists on "soft" funding; i.e. only 11% of the salary pool for this function is included in FM's base operating budget. Consequently the majority of the salary for the project management team is funded through cost-recovery, based exclusively on the hours expensed on individual projects. Private sector industry standard would be to apply project management fee as a percentage of the construction costs. This is inappropriate for University use, as unlike the private sector FM does not have the requirement, or desire, to generate profit. Through internal analysis, on average the project management fee allocated to a project by FM is less than 50% of that which a private sector company would impose. Further, to be considered is the lack of vested interest a private sector company would have to UNB and the project.

This too is a topic addressed at several presentations made to the University community over the years. As roles and responsibilities change, a repeat of the presentation is often necessary. FM recognizes the benefit of providing a statement of clarification of project management fees on its website.

5 (b) Detailed explanation of the uses of the 15% material mark up - use of this money

This question was asked in the follow-up questions posed by the reviews. Answer was as follows:

Project specific materials, acquired only when and as needed, are charged to the account at the cost of acquisition, with no mark-up. Regular maintenance materials, which are managed through FM Stores unit, are acquired at wholesale cost and are marked-up by 15% to account for obsolescence and shrinkage.

FM does not make any “profit” or generate any surplus from the 15% mark up on materials managed through the FM Stores. In fact, the inventory account is not even an FM account; it is a University balance sheet account. Inventory purchased is an asset of the University until used, at which time it is charged to the appropriate building/project. The 15% mark-up is simply an accounting means for the University to recover the cost of items written off due to shrinkage or obsolesce. This is an accepted accounting practice and does not negate the statement that materials are provided at costs – obsolesce and shrinkage are normal acceptable costs. There is no value to be added, and only confusion to be created to draw undue attention to this cost allocation method.

FM disagrees with this comment as there is little to be gained and will only fuel the already unwarranted skepticism.

5 (c) Detailed explanation of reasons for charging back for labour

This recommendation is a repeat of, or at least a component of, the recommendation “Increased transparency on how FM budgets are developed.”

Any quality accounting system will provide for an allocation of costs. The distribution and allocation of FM salary is critically important to allow the University to understand the operating costs of its facilities. For example, it is not meaningful to simply know what the salary costs are for electricians; meaningful information is knowing and understanding how the electrician’s time is utilized. Therefore, whether FM staff time is utilized in the facilities for which FM holds the operating budget, for other University departments, or clients outside the University (NRC, STU, etc.) each and every hour of trade’s time is allocated.

As done in the past, FM is again willing to provide support to the VP Finance and Administration in disseminating this basic accounting principle.

Recommendation # 6 - Review of funding model including salary and non-salary budgets

Response:

FM is of the opinion, the current model – which has been in place for 30+ years - is technically sound and serves the University well. Perhaps it is again from lack of dialogue with the reviewers, but FM is unable to understand or imagine what is hoped to be gained, or the possible benefit, from engaging in a funding model review. FM disagrees with this recommendation.

Recommendation # 7 - Development of a customer satisfaction survey (in collaboration with UNBSJ)

Response:

UNBF – FM has always been interested in receiving feedback from our colleagues. The reviewers posed this question in their written follow-up questions from our survey. FM responded:

FM is VERY interested in receiving feedback. We would invite the reviewers to visit our website, specifically:

<http://www.unb.ca/fredericton/fm/requests/feedback.html>

As stated on the webpage:

Facilities Management is interested in your opinions, suggestions, observations, recommendations and comments.

Of course it is always great to receive positive feedback. It lets us know what we are doing well and what services are viewed as important and adequately provided. However, we also welcome the opportunity to be made aware of your concerns or issues with our service. Awareness is step one towards resolution.

We measure our success through your satisfaction.

For your convenience we have provided the short customer feedback form which you may complete and mail online. You are also welcome to provide your feedback directly to our Director, Mike Carter or 453-4714.

On the same page is a link to a Customer Feedback Form

Very often those wishing to provide feedback do so either directly to FM (Director, Manager or Supervisor).

UNB-F is not opposed to developing and implementing a survey for our colleagues on the Fredericton campus for whom we provide service. In fact the management team has discussed at various times, various methods/types of surveys that could be potentially employed. Any feedback received is always helpful.

However, FM is structured completely differently on each the SJ and Fredericton campuses, with individual, independent Directors. UNB-F FM would recommend each campus should develop independent surveys that are meaning and useful to each.

Recommendation #8 - Establish a FM advisory committee - members from across the University, including Senate, academic departments, and non-academic units

Response:

UNBF – FM is comprised of a collection of dedicated, talented, skilled and credentialed individuals.

The requirements, desires, and opinions of our colleagues on campus are of enormous value, greatly respected and essential in the planning stages of major projects, developments, renovations, and repurposing of space. It is for this reason that committees such as Teaching and Learning Spaces, Accessibility, Transportation & Traffic, Asbestos Steering Committee, Energy Management as well as many and varied project specific working groups exists - and are valued.

A budget committee with varied and wide University representation reviews the FM budget.

A committee with varied and wide University representation reviews, and ultimately recommends, the granting of Priority Funding (non-space and A&R) submissions.

Obviously FM operates and benefits from appropriate input from the University community.

However, when it comes to the day-to-day operation of the unit, FM operates under the capable and respected guidance of the Associate VP Capital Planning and Property Development and vehemently opposes the establishment of an advisory committee. The work of FM is often dictated by policy,

FM is well positioned, and employs individuals with appropriate skill sets, to able to access and prioritize – with constant reevaluation – the global needs and priorities of the University’s facilities.

On the operational side of facilities, FM looks to APPA and CAUBO for expertise and guidance.

To be successful stewards of the assets of the University, FM must be able to continue to act independently under the direction of the VP Capital Planning and Property Development in executing its duties, absent of influence of personal agendas.

Quick Hits
1 Increased transparency on how FM budgets are developed
2 Review work loads of staff
3 Increase transparency of quoting process - itemized, detailed quotes as a means to educate users

**Financial Services
Administrative Review
Summary of Recommendations/Opportunities**

Opportunities and Recommendations

[Payroll services](#)

Recommendation # 1 - Documentation tool so all info is in one place.

Response:

Agree with recommendation. This has been half solved for all the HR/Payroll personnel to use a shared drive. However, for the university community, half the info they need is on the HR website and the other half is on the Financial Services/Payroll web site. It would be nice for one central place for info on the hiring and paying of employees.

Benefits – Better customer service

Recommendation # 2 - Consider a charge to departments for work required to be completed by Financial Services and HR staff to correct overpayments, do reversals, set up receivables, take payments and correct pays in the system by doing waive endorsements in situations where the extra work is avoidable.

Response:

Agree with recommendation. Implementation of a charge for requests for manual cheque was successful in that mgt. was learning of these charges since they saw the entry. Departments are supposed to be monitoring their accounts on a monthly (or more frequent basis). Payroll is pro-active in sending out requests to review payroll charges prior to December. We still have requests to "reverse" payments made (especially to Grad students that were double paid), well after when someone should have noticed how much that student was being paid bi-weekly. Imposing a fine seems to be the only way to get the attention of the departments to review accounts on a timely basis.

Benefits - Errors will be picked up sooner (preferably while the double payments are happening). Reduces the expenses to the university.

Recommendation # 3 - Departments should be more proactive in getting employees paid and give guidance to them on how to use the WebTimeEntry timesheet software.

Response:

Agree with recommendation. The expectation is that department admins are aware of what is required to hire an employee and should be able to train that employee on how to use the UNB electronic time card called WebTimeEntry. We have numerous people who do not complete the electronic form properly.

Benefits -

Employees will be paid on a timely manner. Less manual cheque requests coming to Payroll which means less admin work.

Accounts Payable & Disbursement Services

Recommendation # 4 - On-line Travel Expense Claim processing would strengthen and improve efficiency of the whole expense claim process

Response:

Part of the bigger picture of Ellucian revitalization. General Ledger re-do has been tagged as higher priority. On-line booking of travel might be the first step where hotels with CAUBO rates would be supplied in a drop down box, only certain travel agencies could be used, etc.

All receipts still need to be submitted and audited for tax purposes, so not sure I can give a blanket "agree/disagree" on this one that it would improve efficiency.

- Expense claim process, however a well-defined by individual position Spending Signing Authority must be in place to automate any processes, as well as an increased awareness by approvers of the claims to follow UNB Policy.
- Scanning & Imaging of A/P documentation would enable users to pull up documents related to their departmental charges/vouchers

Benefits - Travel plans would be made up front that follow UNB policy.

Recommendation # 5 - Scanning & Imaging of A/P documentation would enable users to pull up documents related to their departmental charges/vouchers

Response:

This is where we need to move to, but it needs to be very systematic and approved by CRA to shred original documents prior to the 7 year regulation. Agree with this recommendation

Benefits - Storage is an issue as there is no space, so it would help to solve that.

Procurement Services

Recommendation # 6 - Asset receiving could be managed by the financial accounting and reporting functional area.

Response:

This is just moving work from one area to another.

Recommendation # 7 - Electronic requisitions workflows

Response:

Need Spending/Signing authority policy and database maintaining all the users in place before this can be implemented.

Benefits - Departments would type rather than write their requests. Would provide for much faster approving process electronically. Ultimately saves data entry in Procurement.

Departments would need to access Ellucian Colleague and actually use the software. They have been shielded from much of that for 20 years. Some depts. Feel that it is not their job.

Recommendation # 8 - A portal that would allow all UNB employees to access current contracts – “one stop shopping”

Response:

Various departments have contracts they sign for various goods and services. Having them all in one place would provide better customer service.

Benefits – Better customer service

Recommendation # 9 - We are currently gathering information from other schools on thresholds limits for tracking assets and capitalization levels. Increasing the levels would reduce the work and provide a focus on higher value items.

Response:

Basically already completed

Student Accounts & Receivable Services

Recommendation # 10 - Parking fines – security could handle the collection as there is much time spent on collection efforts for \$15 fees.

Response:

Receipting payments and performing collections are two different things. SJ does not do their own collecting. In fact they do not even do their own receipting. In FR Security can do their own receipting, but Financial Services does a large portion of receipting as well. Financial Services does all the collecting. A complete new parking system is being thought of. Perhaps this should be deferred until then.

A major issue is current employees who refuse to pay their parking fines. A great deal of admin work and cost can be consumed trying to collect these fines. But if you do not follow the process, we might as well stop ticketing any employees as no one will pay their fines.

Security staff would need to be trained on how to do proper collections that would be able to go through a court process.

Financial Accounting & Reporting Services

Recommendation # 11 - We are working with Employment Services to investigate the transfer of the administration of the Employment Programs to them.

Response:

Since Employment Services has the knowledge of the students they hired, it would make sense to move the reporting to the agencies to them as well.

Benefits - Knowledge base from start to finish contained into the same office, should provide more efficiency in processing the claims.

- However, resourcing to absorb the work. FA&RS is currently under resourced for the new financial reporting demands

Recommendation # 12 - Review of Capital Asset Policy and capitalization thresholds

Response:

Basically already completed

Quick Hits

Charge departments for corrections resulting from dept. errors

Response:

This requires further education/training of users

Note - Several opportunities mentioned in the review of Financial Services will be addressed through the Project FOCUS initiative.

ITS
Administrative Review
Summary of Recommendations/Opportunities

Recommendations/Opportunities

Recommendation # 1 – consider new model for Tier 1 Support

Response:

This is a high priority for ITS. About 40 positions outside of ITS exist to provide basic IT services such as desktop support to various units on the F'ton campus. In Saint John, Tier 1 support is centralized in the ISS unit. The biggest issue with decentralized Tier 1 support is inconsistency in service delivery and technology support and advancement. ITS is not currently funded to supply Tier 1 services to all, so faculties and units are on their own in providing services. They can hire ITS to support them, they can hire their own staff, or they can go without support. All three alternatives are used, with varying levels of Tier 1 services being delivered to end users. This results in confusing, contradictory support expectations and realities. A growing concern around IT security is particularly worrisome given the varying levels of frontline support available to end users. ITS feels the current Tier 1 support model is not sustainable in the long term, and urges that a review and consolidation be undertaken.

Recommendation # 2 Development of Customer Satisfaction Survey

Response:

This is a high priority for ITS and progress has already been made in pursuing it. For example, a broad student survey was undertaken earlier this year. Further surveys of ITS staff and other staff and faculty will be undertaken to identify issues and priorities that ITS can focus on and continuously improve.

Recommendation # 3 – Cost/benefit analysis of outsourcing or merging mobility and ancillaries (UCard, print, etc.)

Response:

This is a medium priority item for ITS. As noted in item 4 above, Print Services could be outsourced or moved with minimal impact to services currently delivered (please note however that as a result of the 16-17 budget process, a full time position has been removed from PS, with consequent impact to service offerings). A thorough analysis of the current and future business case for Print Services would be welcome. As also noted above, the case for UCard services is not so straightforward; the backend system supported by ITS is essential for several non-ITS functions, so could not be easily isolated and made into a purely cost-recovery unit.

Recommendation # 4 – Review Management and Organizational Structure , number of directors, workloads (ideally use industry standards (other universities))

Response:

This is a low priority for ITS. See comments in item 2 in the previous section. It should be noted that ITS follows industry standards (COBIT) in designing processes, governance, and strategic planning. Our organization chart reflects an artificial view of the unit--the matrix chart shared with the committee reflects our actual operating relationships and more accurately depicts the scope of ITS work.

Recommendation # 5 – Move secure door access to another unit

Response:

This is a low priority item. As noted elsewhere, the door access system is one component of the backend system and software that runs and manages many other services besides door access. However, it makes sense that other units like security and facilities management are better positioned to prioritize and manage door access services and implementation; ITS has a well-developed model of running and maintaining many services that others actually operate (e.g. Maintaining the hardware and software which run the service, but enabling others to actually govern and run the service). It is not clear how overall efficiency would be improved, nor how budgets would be adjusted to reflect a different operating model. An analysis may reveal some answers, though.

Recommendation # 6 – More analysis between CETL and ITS overlapping areas, et IT classroom support – better working relationship

Response:

This is not a priority item for ITS. The issues have largely been resolved.

Recommendation # 7 - Review Finance and HR positions in ITS to answer the questions, should they be centralized

Response:

Discussion in the committee focused on the large scale and scope of IT procurement that ITS conducts on behalf of the University. Highly technical equipment, software, and ongoing licensing and contract management require highly specialized knowledge, follow up, and support. To move positions around would not result in cost savings, but would impede efficiency by removing direct access to technical expertise and to the groups responsible for configuring, installing, and supporting hardware and software. The HR position in ITS has developed out of necessity given the lack of available dedicated support from the HROD unit; ITS is a leader in developing performance review and professional development processes, and needs dedicated support to ensure current and new processes meet the needs of the unit and the University. Removing the position to HR would likely dilute the support ITS requires, given that HROD is stretched as thin as it is. It should also be noted that this position is only 50% HR--the rest is devoted to critical administrative support duties. This is not a priority item for ITS.

Quick Hits

1 – Increase operational efficiencies with CELT

Response:

ITS and CETL have improved their working relationship in recent months. For example, a university-wide video conferencing strategy has been articulated and appropriate consultations have taken place to ensure that misunderstandings and miscommunications are kept to a minimum. I no longer consider this an actionable objective.

2 – Review org structure and the number of directors

Response:

ITS has rebalanced the Solutions and Client Services portfolios, so that the number of staff members in each unit is roughly equivalent. This reduces the overall HR /supervisory workload for the Technical Operations Manager. Both the Technical Operations and Service Operations Managers are focused on ensuring that the staff who report to them have the resources, feedback, training, and growth opportunities they need to succeed. These 2 positions are not technically focused--rather they ensure that the many technical roles in ITS are well managed.

The number of Directors in ITS was discussed previously by the committee, and it is surprising that this appears as an item in this list. It is not clear if the objective is to reduce the number of Directors; if so, I remind you that most of the directors do not have staff reporting to them--they are unique, highly specialized roles that are devoted to ITS and University strategic objectives, and are necessary to ensure that important areas such as research support and IT security are resourced appropriately. The committee should keep in mind that there is no consistent application of titles at UNB; in some cases, the Director title is used to indicate a senior level of management responsibility, but in others indicates responsibility for focused areas (such as Project Management Office, Quality Assurance, etc.). The salaries associated with these positions have been established by HR through its evaluation process, so simply changing titles would not reduce costs.

3 – Create an Advisory Board consisting of ICT industry leaders and professionals from other universities – can be combined with Senate Technology Committee. Review membership and mandate of Enterprise IT Advisory Comm.

Response:

ITS feels that the current Enterprise IT Advisory Committee is sufficient given UNB's current maturity level in its oversight of strategic units and initiatives. Progress has been made in ensuring ITS is strategically aligned, though turnover in the committee membership has slowed down advancement of initiatives like prioritizing strategic initiatives and investments. However, these will come in time, though not quickly. It is not clear what the review committee has in mind in suggesting that external resources be included in a new advisory committee, or that it be somehow combined with the current Senate committee.

4 – Merge or outsource ancillaries from ITS into one cost recovery unit – no base funding (UCard, print, etc) – Business case would be necessary

Response:

The Print Services unit ITS operates could certainly be outsourced or merged with another unit on campus. It is closest to the ancillary model, i.e. It is expected to--and does--recover its costs. On the other hand, the UCard system and service is not financially self sufficient, but then it has not been in operation long enough to realistically expect it to be self sufficient. The backend system that enables all the card services is essential for door access, student IDs, meal plans, library circulation, etc., which are overhead services that cannot be separated from the transaction services that UCard is developing. Like Print Services, the UCard could be merged with another unit, but the associated services and systems would have to go with it, in addition to the budget to support it.

**Capital Planning and Property Development – Fredericton Campus
Administrative Review
Summary of Recommendations/Opportunities**

Opportunities and Recommendations

Recommendation # 1 – Strengthen space management Unit to better plan and utilize existing space; space inventory management software

Response:

In agreement with the recommendation. Space is a very important UNB resource, similar to human resources, space management should have a high priority value to UNB

Benefits of implementation:

1. We better understand this resource and its costs.
2. Dedicate this resource to highest demand uses, or those that provide best return to UNB.
3. Poor utilization exacerbates DM.
4. Key indicator for long term planning purposes.

Identification and discussion of constraints of implementation:

1. Dedicated human resources are needed before any space inventory software is purchased.
2. First step is enhancing space data collection & validation, development of a space management policy (needs VPF & VPR support) and then selection of software solution than will meet our needs.
3. Will require a cross unit committee (FM, ITS, RL&CS, etc.). Therefore, this initiative will need to be assessed as a campus priority in the context of highest return value against other campus initiatives.
4. The same software should be used on both campuses for consistency in reporting.
5. Will require on-going annual maintenance & licensing costs for any software.

Any impacts (positive or negative) to other stakeholders (students, faculty/staff, other UNB units; government, public) that may result from implementation of the recommendation:

- Negative – Perceived loss of control by units/departments over space decisions, creation of another policy and administrative oversight.
- Positive – Ability to demonstrate efficient use of space – benchmarked against other institutions; better long term planning to support space needs, understand and justify space costs (important if moving to a RCM budget model).

Recommendation # 2 - Explore procuring gasoline from DTI depot to take advantage of PNB rates

Response:

In agreement with recommendation. Although this idea was put forward from the CP&PD office it should be assessed by FS and Procurement as lead

Description of any benefits of implementation:

1. Potential cost savings.
2. Elimination of an environmental risk

Identification and discussion of constraints of implementation:

1. Will require a cross unit committee (FS, FM, T&S, RL&CS etc.) and therefore this initiative will need to be assessed as a campus priority in the context of highest return value against other campus initiatives.
2. Will need PNB approval and form of agreement/payment terms etc.
3. Would suggest if possible that it is rolled out to Security and Traffic and FM first and then other units with vehicles come on board after the trail period.
4. Will require a gas card and appropriate authority delegated for use (Policy?).

Any impacts (positive or negative) to other stakeholders (students, faculty/staff, other UNB units; government, public) that may result from implementation of the recommendation:

- Negative: Perceived loss by units/departments of flexibility to purchase gas where they want. Will require the allocation of limited resources to do up front assessment, however this has the potential to be off set with longer-term staff savings.
- Positive: Ability to demonstrate efficient partnership with PNB to save on gas costs campus wide.

Recommendation # 3 - Capital Project Software and deferred maintenance software.

Response:

In agreement with recommendation. The delivery of capital projects is housed within FM, this issue has been discussed for the time I have been here, for example PNB has a comprehensive program that enables the quick assess to all important project information (costing, schedule, payments etc.). It should be noted that their capital program is significantly larger than UNBs and therefore worth the investment.

Description of any benefits of implementation:

1. Increased transparency with clients.
2. Increased staff efficiency.
3. Ability to forecast/track status, more informed decision making.
4. Informs PC, Comptroller reports

Identification and discussion of constraints of implementation:

1. Will require support and adoption by FM.
2. Will require a cross unit committee (ITS FS, FM, etc.) and will therefore this initiative will need to be assessed as a campus priority in the context of highest return value against other campus initiatives.
3. Will require on-going annual maintenance & licensing costs for any software

Any impacts (positive or negative) to other stakeholders (students, faculty/staff, other UNB units; government, public) that may result from implementation of the recommendation:

- Negative: Perceived extra workload by project capital coordinators; will require annual ongoing maintenance, licensing costs.
- Positive: Ability to demonstrate efficient partnership with PNB to save on gas costs campus wide.

**UNBSJ Capital Planning
Administrative Review
Summary of Recommendations/ Opportunities**

Opportunities and Recommendations

Recommendation # 1 - Strengthen Space Management Unit to better plan & utilize existing space; space inventory management software.

Response:

Capital Planning already works closely with Facilities Management, Registrar's Office, Residence & Conference Services, Environmental Health Safety & Security and IT Department all of which share information to better plan space requirements. In addition we use the datatel software to track changes.

Recommendation # 2 - Capital Project Software and deferred maintenance software

Response:

Capital Planning implemented VFA software as of October 2015.

**Registrar – UNBF & UNBSJ
Administrative Review
Summary of Recommendations/Opportunities**

Opportunities and Recommendations

Recommendation # 1 - Abandon – graduation ceremonies tickets or move to electronic ticketing (FR)

Response:

This point has been raised with the recent review of encaenia/convocation ceremonies in Fredericton. The Fredericton Registrar's Office is in agreement with this recommendation and will endeavor to move this activity to the Conference Services Special Events Unit for the future.

Recommendation # 2 - Abandon - OUAC process for Ontario Schools (FR/SJ) – labour intensive with little benefit – very few applicants

Response:

This was initially implemented at the insistence of the former VPA and director of recruitment. Since its inception, the OUAC process has been complicated and cumbersome to administer and yielded few results. As the onus of the new Recruitment unit has been to encourage earlier applications and assessment, the OUAC process which occurs in January and later is no longer in concert with these efforts. The Offices agree to abandon this process.

Recommendation # 3, 4 & 16

- **Consolidate - classroom assignment between Registrars -- could be centralized with one person assigned on each campus for special requests**
- **Consolidate – exam and course scheduling between Registrars (on-line data collection for course timetables and exam scheduling**
- **new - On-line Data collection for course Timetable and Exam scheduling. (FR/SJ)**

Response:

In short the major issue (in particular in Saint John given staff reductions) is the resources required by both Offices to secure and manually input the course data – which informs the processes included above. Given the fundamental nature of this data which creates the teaching, learning and testing environment for all of UNB for an academic year, accuracy is paramount and essential. The Offices agree that synergies in principle could be realized, but that with current human and IT resources that this, while desired, is simply not possible. Saint John no longer has a resource assigned to these duties, and Fredericton has the bare minimum to complete the task/s. It is not feasible in current conditions to simply consolidate the work to Fredericton as this would jeopardize this function as it is in Saint John. In the spirit of understanding and collegiality however, the Offices agree that with the development of a user inputted online submission interface, ideally directly into an appropriate place in Colleague, that such consolidation could more readily occur and be facilitated at the optimization level by the Fredericton Office. It is also agreed that as each campus has a thorough understanding of the individual and specific campus needs of faculty, students and particular spaces of that respective campus, that as indicated in the recommendations, special case scenarios (of which there are many) would need to be handled by each respective Office.

Recommendation # 5 – Consolidate transcript requests between Registrars**Response:**

It is agreed that this recommendation be implemented; however to ensure the best possible service to students on either campus, that it be limited to online requests. In person requests will still be conducted by the respective campus Office. A robust system including managing transcript fees and courier service/fees is already used by Fredericton and will be expanded to include SJ. This will be facilitated by the jointly used Footprints system to ensure tracking, and students will still have the option of choosing method of delivery. It is also agreed that as what truly matters is the accuracy of the academic record and not campus, that transcripts can be issued for either campus by either campus

Recommendation # 6 - Consolidate - document clerk responsibilities for applications**Response:**

It is not clear what is intended here or what the perceived value of this proposal would be. Clarification is required before comment can be offered.

Recommendation # 7 - consolidate - T2202A reprints – Financial Services deals with dollars, tuition amounts – Registrar tracks months attended**Response:**

It is not clear what is intended here even with the qualifying statements in the report. Clarification is required before comment can be offered. In addition as the Saint John office serves both as the Records and Student Accounts operation, this recommendation, even when clarified may have little impact on their operation.

Recommendation # 8 - Transfer – Student opinion surveys administered completely out of AVP Academic office**Response:**

It is wholeheartedly and jointly agreed that this task be moved outside of the Offices of the Registrar. There is NO value add to the Registrar's office from this task, and in both Fredericton and Saint John, the positions associated with carrying out this task have been eliminated.

Recommendation # 9 - transfer - Return scholarships and awards to the Registrar's office from Recruitment and Marketing. (FR/SJ)**Response:**

A decision was made last year to move this unit from the Office of the Registrar (FR) with a bi-campus SJ link, to the recently formed Recruitment unit under the Assistant VP Recruitment. As the Awarding of scholarships and special awards takes place after assessment of admission, and/or during a student's academic progression through a program while already at UNB, the alignment with Recruitment and away from the Offices of the Registrar is illogical. This recommendation will have to be directed to the senior administration as the Registrars do not have the authority to undo a decision that was enacted by that group.

Recommendation # 10 - New - Development of electronic program and course calendar templates

Response:

It is not clear what is intended with this recommendation. Is the recommendation intended to support degree audit and management of the production of the online calendar. These represent MAJOR undertakings that will require time and resources as well as commitment from key service offices, not just the Registrar's office. Clarification of this recommendation is needed before further comment can be offered.

Recommendation # 11 - New - update Admissions Packages to the new UNB brand "look" (FR/SJ)

Response:

Agreed, and already underway with support from Marketing. The issue will be securing funds (if required) for such development and production, initially and on an on-going basis.

Recommendation # 12 - Transfer - relationship between CEL and Registrar's Office needs to be reviewed.

Response:

It is agreed that in Fredericton the relationship of the Office of the Registrar and CEL needs to be reviewed and opportunities realized. Add to this SGS in terms of core services/responsibilities provided by the Registrar's Office that to varying degree are duplicated in these other units. To what extent should the Registrar's Office can and should the Registrar's Office assume responsibility for services? It should also be noted that the recent LCC report addressed concerns with the mandate of CEL and this likely would have to be taken into consideration in any review of shared/duplicated services.

Recommendation 13 – SGS and no-degree registration (transfer - registration of students applying to SGS to SGS no-degree program rather than UG no-degree program)

Response:

This matter is already under review with SGS and will be resolved.

Recommendation # 14 - new - review Online Application (OA) for possible expansion right to course registration. (FR/SJ)

Response:

The Offices agree that it is desirable to provide the most informative and easiest to navigate system for especially new and prospective students to engage with the admissions process. Since the online application portal is utilized by the majority of applicants, and is therefore understood by them already, that enhancements could be made to this portal in terms of residence (application and status, deposits) scholarships (status and amounts) confirmation fees, etc.

Recommendation # 15 - new - develop self-serve interactive web forms that are integrated with Colleague (FR/SJ)

Response:

The Registrar's Offices completely concur that integrated forms that allow for more effective and efficient service for constituents, and assist staff in reducing unnecessary work is greatly desired. Many forms and associated processes (Confirmation of enrolment, exam deferrals, confirmation of graduation) and a plethora of others could lend themselves readily to such efficiency. Although this is a desire of the Offices, we are very conscious that it would involve IT support and resourcing.

Recommendation # 16 included with # 3 above

Recommendation # 17 - Develop a Self-serve Confirmation of Enrolment letter so students could print their own. (FR/SJ)

Response:

Agreed. This project has been ongoing for some time and final development/implementation is now with ITS.

Recommendation # 18 - UNB enterprise POS to streamline the processing of admission confirmations and their status on records

Response:

Similar to previous recommendations, the Offices agree and recommend that a robust e-commerce POS system be adopted. We are unsure if this may be a priority or enhancement under the FOCUS project and would need the support of other units at UNB to realize, namely ITS and Financial Services.

Recommendation # 19 - Move to same grade entry processes for on-line credit courses as for regular courses (FR)

Response:

The Offices agree that the online grade system needs upgrading, including functionality that would include asynchronous online grade submission; as with other recommendations this would require the assistance of ITS for this to occur.

Recommendation # 20 - One stop shop for student registrar and financial services as is the case in SJ. (FR) (Service UNB)

Response:

The Offices fundamentally agree with this recommendation in principle but implementation runs into significant challenges in Fredericton with regard to physical location and support services. While a fully integrated unit such as implemented this year by SJ may not be possible, a hybrid approach, bringing the two units into adjacent space with a possible shared counter would be a big step forward.

Concluding remarks

International admissions support

With the upcoming and imminent implementation of Perceptive Content and document imaging, the Offices recommend that the international document and service support person currently located in Beaverbrook House be relocated and reorganized within the Office of the Registrar (SJ). This relocation would not only facilitate the ImageNow process more readily, it would mitigate current vulnerabilities within this currently singular role, as well as place this person directly with those that they work with and support in the admissions process.

Document imaging

The Offices found it interesting that document imaging was not noted under opportunities and recommendations. The first steps in implementing document imaging in relation to admissions covering the two Registrar's offices as well as international recruitment are underway with the intent that this will be the foundation for expanding to integrating business practice via document imaging and faculty offices and other areas of the Registrar's office service units.

In closing, the Offices currently enjoy a collaborative and collegial working relationship and often support each other and act as a resource for one another throughout the various workflows and cycles of a year. The Offices are ever open to exploring and implementing new ideas and processes together and welcome such feedback as provide within the Review. We look forward to engaging with the reviewers or the President's Executive Team in visioning and continuing to play an integral role in creating and ensuring the best possible environment for students and faculty to learn and teach.

**Security and Traffic – UNBF & UNBSJ
Administrative Review
Summary of Recommendations/Opportunities**

Opportunities and recommendations

Recommendation # 1 - Perform a study of parking fees and related costs to determine if fees are appropriate (F & SJ)

Response:

- Submitted November 19th, 2014.
- Waiting for UNB PET and BOG to approve same.
- UNBSJ - A study of parking costs should be a top priority as we are no-where near market value with expenditures doubling revenue. We currently have a parking plan which includes all costs for UNBSJ and market comparable, just need to update the numbers.

Recommendation # 2 - Commissioner of Student Discipline (F) (Sarah DeVarenne) should serve as Commissioner for SJ; currently Manager, EHS conducts investigations and then determines whether there is enough evidence to make a charge under SDC – conflict of interest (SJ)

Response:

- UNBF already follows this procedure.
- UNBSJ agrees with moving the duties of Commissioner of Student Discipline to Fredericton. Sarah DeVarenne (SD) currently does this duty in Fredericton and assuming the workload from UNBSJ would be very minimal as UNBSJ averages one SDC incident a year. This will remove the conflict of interest in having the Security Manager investigate and decide if the evidence warrants a referral to SDC – if SD is in agreement

Recommendation # 3 - Responsibility for Parking lot/road maintenance should be transferred to Facilities Management; snow removal already transferred and expertise is in Facilities Management, not Security (SJ)

Response:

Responsibility for UNBSJ parking lot and road maintenance has been transferred to Facilities Management. This places the responsibility with the department set-up for that purpose. Security Manager maintains the ability to call in necessary repairs to potholes as required.

Recommendation # 4 - Develop online payment system for student parking permits– ITS has project for this (F & SJ)

Response:

- Issue discussed at ITS meeting on May 30th, 2016, who are conducting their analysis and is a number 1 priority for automated requirements.
- UNBSJ - Strongly agree, online permit/fine payment option for students will decrease workload demand and student wait times – streamlining the whole process. I believe this should be priority two.

Recommendation # 5 - Consider parking meters (F)

Response:

- UNBF Facilities Management is conducting costing analysis to install same. UNBF security working with FM as to locations of same. Melisa Dawe chairs the UNBF Traffic Committee and FM has the lead on this issue. Graig Hickey is already doing the analysis as to cost, etc. In addition to this ITS meeting with ITS on May 30th, 2016, Melissa Dawe chairs the UNBF Traffic Committee whereby meters are a part of the agenda. The lead on this is FM.

Recommendation # 6 - Adopt e-ticketing system (F)

Response:

- UNBF ITS is reviewing same however compatibility with UNBF Financial Services as to Datatel will have to be worked out between FM and Financial Services.
- Benefits include real-time data entries in a timely fashion and allows security staff to issue tickets quickly in all weather conditions. Also the department clerk would not have to manually enter manually written tickets.

Recommendation # 7 - Develop App for purchasing day pass (F)

Response:

- UNBF ITS is reviewing same however compatibility with UNBF Financial Services as to Datatel will have to be worked out between ITS and Financial Services.
- Staff/Faculty/Students/Visitors would no longer have to come to the security office to buy day passes however we need a ITS/Datatel system which includes ability to instantly validate the pass.

Recommendation # 8 - Payment of parking fines online – whether through eServices or UCard

Response:

- UNBF ITS is reviewing same however compatibility with UNBF Financial Services as to Datatel will have to be worked out between FM and Financial Services.
- Reduces need to attend the security office and/or financial services to pay such violations.

Recommendation # 9 - Use UCard for student parking payments and fines

Response:

- UNBF ITS is reviewing same however compatibility with UNBF Financial Services as to Datatel will have to be worked out between FM and Financial Services.

Quick hits

Parking fines – security could handle the collection (Fredericton campus—SJ already does this).

Response:

Parking fines – security could handle the collection (Fredericton campus—SJ already does this).

*ITS is leading an assessment of options for an automated solution.

- The UNBF security department always issued violations and collects the fines. We enter the violation financial data, along with the violators name into Datatel which shows up on the student/staff accounts along with a follow up email from me to the violators. The majority of violators here at UNBF already chose to pay their fine at the security office however some students and staff pay their fines at Financial Services. Especially, at graduation time and permit renewals.
- The department also issues parking permits to UNBF, St. Thomas University and NBCC. This arrangement has allowed for UNBF to increase revenue by selling STU and NBCC permits. In addition, violation revenue has increased. The wheel immobilizer has also helped change parking behaviour which is a contributing factor to permit sales and permit sales.
- **UNBSJ** - I believe this one is reversed and refers to UNBSJ as, I believe Fredericton already accepts fine payments and permit purchases at their security office. However, this option will not be possible for UNBSJ. Currently the Finance office is the only location students need to go for all their needs. To create a second location for permit and fine sales/payments may create student confusion. Further, UNBSJ Security has reduced staffing significantly thus does not have the staff to man this option and would need to hire students to sell permits and accept payments. This option would come at an increased cost for very little (if any) benefit.

In conclusion, all foreseeable Recommendations/Opportunities accomplishments dealing with efficiencies and effectiveness to enhance our department’s service delivery model will heavily rely on ITS and how there analysis proceeds. However, in the meantime the department is in the process of tendering for more cameras to add in providing safe walking and parking areas.

FACILITY OPERATIONS – FACULTY of KINESIOLOGY
Administrative Review
Summary of Recommendations/ Opportunities

Opportunities and Recommendations

Recommendation #1 - Inventory Tracking Software (better utilize existing equipment)

Response:

Several different software packages are being evaluated. CURRENT and KX to name two.

Recommendation # 2 - Reduce dependencies on external sourcing of equipment (for use by external rentals). This would increase revenues.

Response:

Currently using carry forward funds for this purpose – tables; round, bistro, banquet, up lights, pipe and drape, large screen TV monitors, stage units, carpet cover, (all of which are charge back items – therefore costs will be recoverable)

Recommendation # 3 - Amalgamate Athletics, URec, Kin Facilities

Response:

As outlined in the Faculty of Kinesiology's Academic Planning document "The Faculty of Kinesiology is unique as not only does it have oversight of undergraduate and graduate academic programming but is also responsible for 1) Varsity Athletics; 2) Campus Recreational Services; and 3) Athletic and Recreational Facilities Management. These units submitted unit administrative reviews, however it is important to understand the integrative nature of the Faculty. Varsity coaches have a 0.15 FTE assignment in the academic program and typically teach 3ch/year of activity courses associated with Education Preparation stream. Campus Recreation, Varsity Athletics, and Facility Operations also provide a valuable training environment for students interested in athletic therapy, strength and conditioning, wellness programming, recreation planning and programming, sport and recreational marketing practice and internships." The Faculty has indicated its desire and commitment to review the three units in an effort to ensure efficiency and effectiveness of their operation and program delivery.

Quick Hits

1. Facilities booking to Conference Services –

Response:

I have already explored this option and have decided to stay with the system we currently have in place.

2. Service UNB opportunity for some payments

Response:

In order to make an informed decision, I would need more information regarding the Service UNB Model.

UREC
Administrative Review
Summary of Recommendations/ Opportunities

Opportunities and Recommendations (prioritize based on efficiencies or cost savings)

Recommendation # 1 - Service UNB model for registrations, payments, event ticket purchases

Response:

The recommended Service UNB model is a new concept. In order for us to respond to this recommendation, we'd appreciate it if we could have a clear idea of what it looks like, how it functions, what aspects are involved, what the business hours it operates. Without a framework and the detailed working process, it would be difficult for us to comment on.

Recommendation # 2 - Facilities Scheduling software

Response:

URec currently requests space bookings through Kin Facility Operations who book via Astra. Astra does not appear to be user friendly nor does it seem to accommodate all needs. We feel that Astra has already had negative effects on community members (inability to view calendars). URec does have a system management software called Innosoft Fusion, which manages all memberships, course registrations, locker rentals, towel services, parking permits, other products

Recommendation # 3 - Amalgamate Athletics, URec, Kin Facilities

Response:

As outlined in the Faculty of Kinesiology's Academic Planning document "The Faculty of Kinesiology is unique as not only does it have oversight of undergraduate and graduate academic programming but is also responsible for 1) Varsity Athletics; 2) Campus Recreational Services; and 3) Athletic and Recreational Facilities Management. These units submitted unit administrative, however it is important to understand the integrative nature of the Faculty. Varsity coaches have a 0.15 FTE assignment in the academic program and typically teach 3ch/year of activity courses associated with Education Preparation stream. Campus Recreation, Varsity Athletics, and Facility Operations also provides a valuable training environment for students interested in athletic therapy, strength and conditioning, wellness programming, recreation planning and programing, sport and recreational marketing practica and internships." The Faculty has indicated its desire and commitment to review the three units in an effort to ensure efficiency and effectiveness of their operation and program delivery.

Quick Hits

1 Possibly increase memberships and fee-for-service programs to community.

Response:

URec went through a strategic planning process last year, the membership increase is one of our strategic goals. Our primary targets of membership sales are faculty/staff, alumni and general community.

**Varsity Reds
Administrative Review
Summary of Recommendations/Opportunities**

Opportunities and Recommendations)

Recommendation # 1 - Include Athletics in the UNB media tracking system – will provide fact based information that will be used to increase partnerships.

Response:

We submitted this item within our report and are in agreement it should be considered. Having this data would allow us to better articulate the impact we have in terms of helping to promote the UNB brand, recruit, improve the image and continue to provide relevance. We generate significant content for local papers and broadcasts, likely more than any other department/faculty, but it is not currently recorded by the university. Having consistent and regular data year after year would also lead to increased partnerships based on the scope and reach we accomplish.

Recommendation # 2 - Increase donor development – Athlete alumni that make donations give at a higher than average rate.

Response:

We submitted this item within our report as we feel we have the ability to externally generate more dollars than we currently are executing. For several years we had dedicated support from Development/Donor Relations. In recent years, due to that individual advancing into a senior role, that support couldn't continue. That individual does her best, but realistically she is much too busy securing larger gifts. Our current ability to steward is very limited. Our hope is that the university, through Development/Donor Relations, might wish to consider designating a 0.5 or 1.0 position specifically to athletics as has been the case in the past. This is also happening at other Atlantic universities. Data exists that show alumni who were involved in athletics tend to give back at a higher percentage than alumni who were not. Athletics is also a popular area for donors to select when giving back.

Recommendation # 3 - Combine Campus Rec, V-Reds and Facilities – potential for increased efficiencies and reduced staff requirements.

Response:

As outlined in the Faculty of Kinesiology's Academic Planning document "The Faculty of Kinesiology is unique as not only does it have oversight of undergraduate and graduate academic programming but is also responsible for 1) Varsity Athletics; 2) Campus Recreational Services; and 3) Athletic and Recreational Facilities Management. These units submitted unit administrative, however it is important to understand the integrative nature of the Faculty. Varsity coaches have a 0.15 FTE assignment in the academic program and typically teach 3ch/year of activity courses associated with Education Preparation stream. Campus Recreation, Varsity Athletics, and Facility Operations also provides a valuable training environment for students interested in athletic therapy, strength and conditioning, wellness programming, recreation planning and programming, sport and recreational marketing practica and internships." The Faculty has indicated its desire and commitment to review the three units in an effort to ensure efficiency and effectiveness of their operation and program delivery

**UNBSJ Athletics, Recreation & Wellness
Administrative Review
Summary of Recommendations/ Opportunities**

Opportunities and Recommendations

Recommendation # 1 – Increase athletic financial awards for returning students (maintains enrolment)

Response:

Assessment of priority: Good goal but many challenges associated with it

Agree with the recommendation: Yes.

Description of any benefits of implementation: More funds available for identified returning student-athletes would be beneficial for those student-athletes who may need financial help to continue attending at UNB Saint (thus helping to retain these students).

Constraints of implementation:

- (1) This is a purely donor driven exercise – no donors equals no funds. Athletics has to find donors to make this fund grow but a key challenge is that UNB Saint John has a “young” group of graduates who played in the ACAA so the donor pool will likely remain shallow for a few more years to come. There are many former Seawolves who now professionals – doctors, dentists, etc - but they have student loans, mortgages and young families so donating to the program is not on their radar at the moment. Still, there is the hope that one or more graduates will achieve great wealth and success, thus putting them in a strong position to donate large amounts of money to this scholarship fund. The one problem is that it doesn’t help right now.
- (2) It is hard to assess if a student-athlete is leaving or threatening to leave strictly for financial reasons as they sometimes play one institution against another to raise the financial stakes. One thing that complicates the issue is that even though it is well explained, returning student-athletes sometimes assume they are getting the same athletic financial award they received as an incoming student and are “surprised” when they don’t get anything. Then they hear about the rookie getting \$2,000 (or whatever amount) and it doesn’t sit well with them, especially if they are a better player.
- (3) Athletics must and will find ways to promote the “Friends of Seawolves” donation account as widely as possible and work with DDR to identify and solicit key potential donors. This will have to be very strategic and selective given that the staff complement is down by one heading into the fall of 2016-17.

Impacts on other stakeholders: Losing even one student impacts everyone directly or indirectly at UNB Saint John these days so limiting the number of student-athletes transferring to other institutions is important.

Recommendation # 2 - Service UNB model for registrations, payments, event ticket purchases

Response:

Assessment of priority: Drop it – the unit already has registrations and payments processed through the “one stop” financial services window at UNB SJ – things such as event ticket purchases (which are rare) will be discussed with them should the need arise. The real issue was the desire for an online registration / ticket purchase / payment platform that is UNB central. Currently the unit either uses the financial services desk, or Eventbrite, etc (which has a service fee attached).

Agree with the recommendation: Yes but can work without it.

Description of any benefits of implementation: It is easier for clients

Constraints of implementation: There is no university central fee centre so Athletics will use an external service agent (example Eventbrite) to create on-line payment options for users and either absorb or pass on the extra fee to the client.

Impacts on other stakeholders: Will simply make it easier to register or buy tickets, etc.

Quick Hits

Separate budget for playoffs (now comes from operational budget, uncertainty on how much to save for playoffs affects spending decisions. Some years 0 playoff expenses, some years 1/3 of operational budget.)

Response:

Assessment of priority: It is good and eliminates a regressive budget approach (that is, the greater success, the greater the budget hit to the unit).

Agree with the recommendation: Yes, but this was essentially a request for increased funding (during the initial discussions) that would have seen the present non-salary budget be used for regular season and then UNB Saint John be responsible for funding playoff costs on an as needed basis (that is, as teams advanced to and competed in the ACAA playoffs). This will not happen now given the budget restraints and future prognosis. Athletics will continue operate as in the past for regular season and playoffs (the unit is deficit-funded and raises a substantial proportion of its operating funds through camps, sponsorship, etc.) and will strive to continue raise revenue to contribute to funding the existing varsity teams.

Benefits of implantation: Would help to mitigate unexpected costs or risk (for example, increased travel costs).

Constraint of not implementing this: It is getting harder to generate enough revenue to supplement the allocated varsity operating budget (need to generate at least \$50,000 per year now to keep in the black).

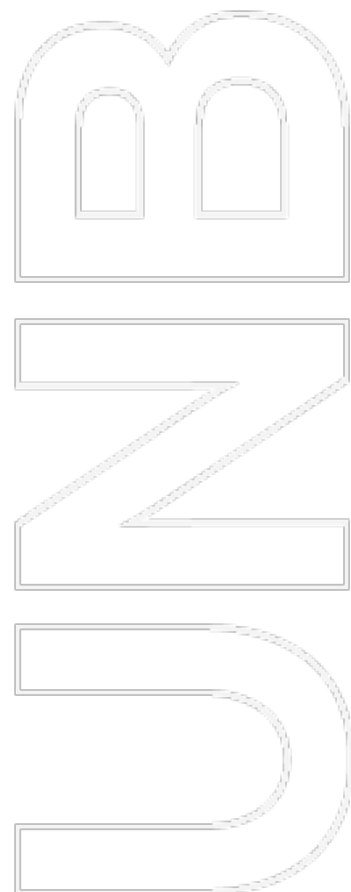
Impact on other stakeholders if implemented: Implementation would be a positive but again, it isn't going to happen. If teams are successful (as is the goal) then up to 1/3 of the operating budget could be needed for playoffs. This makes successful seasons a “win-lose” scenario.

**Administrative Review
Recommendations on Automation
June 9, 2016**

- Registrar – on-line workflows, e-signatures
- On-line travel expense processing
- Online payment system for student parking permits
- Financial Services – documentation tool so all info is in one place
 1. *There is no one central place for the university community to get all the details on how to hire and pay a person and what is required. The HR component is on the HR web site and other components are on the Financial Services web site.*
 2. *The second part was for the working relationship between HR and Payroll. That has essentially been solved with a shared folder on the P drive.*
- Scanning and imaging of Accounts payable documentation would enable users to pull up documents related to their department charges/vouchers
- Procurement- a portal that would allow all UNB employees to access current contracts “one stop shopping” (contract management)
- Adopt e-ticketing system for parking
- App for purchasing day parking pass
- Electronic ticketing for graduation tickets (UNBF)
- Transcript requests
- T2202A reprints
- Electronic program for course calendar templates that integrates with work of Senate Curriculum Committees and production of UNB Calendar.
- Review Online Application for possible expansion right to course registration
- Processing of Admission Confirmation (\$100 deposit) is problematic as it involves another office and the “CONF” status code is not seamlessly tracked to the student application record. A UNB enterprise POS would assist with making sure UNB is PCI compliant with storage of credit card numbers.
- Self-serve forms integrated with Colleague will be helpful and greater use of interactive web forms by students and faculty/instructors
- On-line data collection for course Timetable and Exam Scheduling
- Develop a self-serve confirmation of enrolment letter
- Inventory system for Kin-facilities re chairs/tables, etc
- Software for Kin-facilities booking (Astra, Conference Services?)
- Procurement – electronic requisitions workflows
- Capital Planning – capital project and deferred maintenance software

APPENDIX C

'Why UNB' Update



#OnlyHere Year 2:

a. Research and Background

Qualitative and quantitative research have informed the direction of the #OnlyHere campaign at every stage. In the first year, qualitative research uncovered that when choosing a university, there are two main types of prospective student decision-makers: credential seekers who are mostly interested in the credentials of a university, and assurance seekers who are also concerned about what the university will “feel” like.

In the second year of the #OnlyHere concept, our messaging addresses both of these decision-makers. We added an additional variable into the research – familiarity with UNB to compare against the type of decision-makers. From this we uncovered that those with low familiarity of UNB who are assurance seekers are most likely to also respond to proof points about UNB that speak to student experience. Credential seekers remain most impacted by proof points that focus on credential-building, and assurance seekers with high familiarity of UNB are also more greatly impacted by credential-building proof points.

This has influenced our creative strategy as we have introduced some high-impact experiential proof points only in markets with low familiarity – Ontario and Alberta.

b. Goals

We have set two prospect goals for year 2:

- +7.5% in Grade 12 prospects
- +5% in Grade 11 prospects

These goals are calculated to support Student Recruitment’s application goals for the 2017/18 intake year and are a shared objective between Marketing and Student Recruitment.

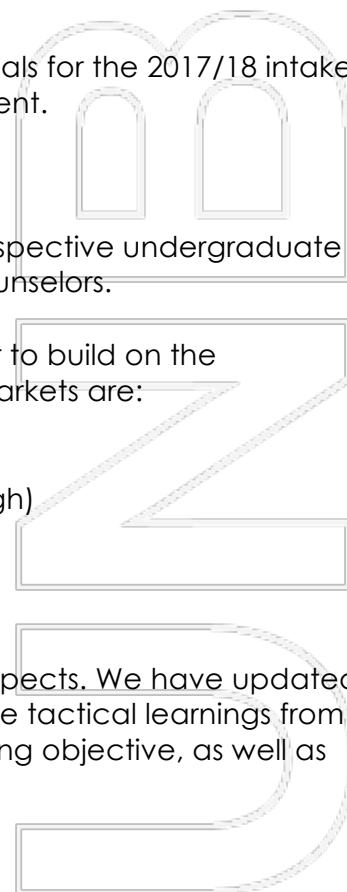
c. Media Strategy

Target audiences: Year 2 continues to focus on the target audiences of prospective undergraduate students, parents of prospective undergraduate students and guidance counselors.

Target Markets: The five target regions have been maintained from last year to build on the momentum of year 1 and to support Recruitment Office strategies. These markets are:

- Alberta (Calgary)
- Ontario (Ottawa, Halton Hills, Burlington, Oakville, Milton, Peterborough)
- New Brunswick (Fredericton, Moncton, Saint John)
- Nova Scotia (Halifax, Truro)
- Prince Edward Island

Objectives: The goal of the #OnlyHere campaign is to deliver qualified prospects. We have updated our recruitment funnel this year to better reflect the tactical learnings from year 1. Each level of the funnel has a corresponding objective, as well as specific media tactics.



- Awareness
 - Objective: Impressions of ads
 - Role: Focus on creating a connection with UNB and build/ strengthen the connection through consistent ad exposure
 - Tactics: Print, cinema previews, high school murals, digital video pre-roll, online display ads, geo-targeted mobile ads, social media platforms
 - Ottawa takeover: High-impact, concentrated investment in a target market outside the Maritimes that includes bus wraps, murals, digital billboards, high school posters and cinema previews
- Consideration
 - Objective: Website visits
 - Role: Drive qualified traffic among our target audiences to unb.ca
 - Tactics: Online display, mobile sentiment and places targeting, Globe & Mail editorial content and display ads, social media, Google search ads
- Application-Driving Behaviours
 - Objective: Web inquiries
 - Role: Drive web inquiries amongst our target audience through contest to win free first-year tuition
 - Tactics: Online display ads, targeted email blasts through Student Life Network, social media
- Prospects
 - Objective: Overall prospect numbers
 - Role: Prospects are driven as a result of the actions in the first three levels of the funnel

Other Marketing Office Priorities

In addition to the #OnlyHere campaign, the Marketing Office is focusing on the following priority areas:

1. Digital Initiatives

Initiatives pertaining to the online face of UNB in the following categories:

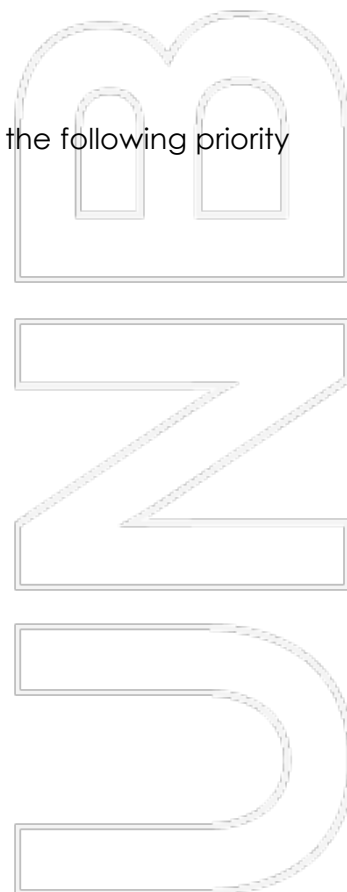
- 2015+ website update
- Web governance
- Capacity building and support
- Social media

2. Unit and Faculty Support

Initiatives that build relationships and enhance collaboration including:

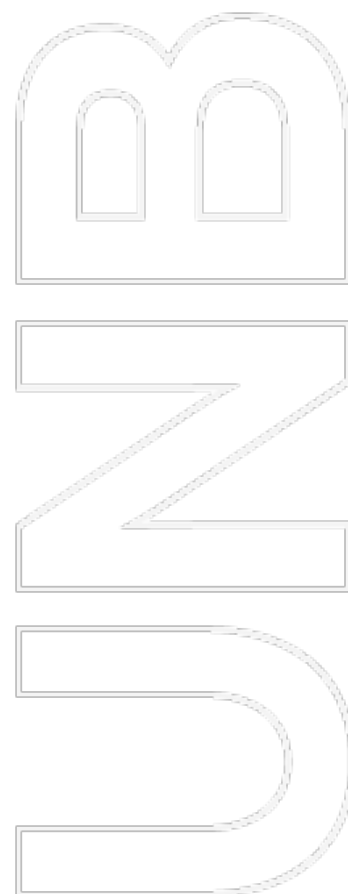
- Marketing plans
- Brand foundations
- Marketing requests
- Service evaluation

3. Brand Integration and Longevity



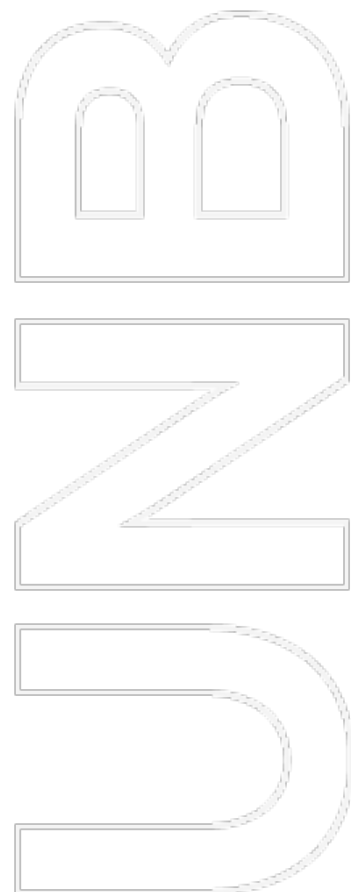
Initiatives that strengthen the UNB brand including:

- Stakeholder support and engagement
- Brand integration
- Brand asset development
- Brand ambassadors



APPENDIX D

Student Recruitment Update





Memo

TO: UNB Senates

FR: Lloyd Henderson, AVP - Student Recruitment & Strategic Enrol Mgt

Date: October 14, 2016

Re: Update Report On Student Recruitment and Strategic Enrolment Management

Dear Senators,

This memo is provided to give some initial analysis of the Fall Enrolment numbers covering Domestic first year high school and transfer enrolment, International high school and transfer enrolment and preliminary Graduate enrolment both domestic and international. (firmer graduate enrolment numbers will be available in November due to the enrolment cycle for some of programs like the MBA cohort in Saint John) The numbers used in this report are head count only and have been reviewed by the Registrars

A separate report from the Registrars will be provided on overall enrolment numbers at UNB (all years) using both head count and FTE numbers.

FALL 2016 Enrolment

Domestic

As has been previously shared, aggressive goals were established for Student Recruitment for 2016, 2017 and 2018.

Notably these goals included an 8% increase in applications, increasing the conversion rate from Application to Enrolled to 47% and ultimately generating High School and Transfer first year enrolment of 1880. I have included a snapshot of the targets and some notes in the table below.

The actuals achieved were a 10% increase in applications, a conversion rate of 43.74% and new first year enrolment of 1704.

Applications

The impact of the recruitment marketing campaign - #OnlyHere and the work plan established by the Student Recruitment unit have had obvious positive impact. The gross increase of 356 applications (net increase of 193 – see notes section of table below) in a single year is outstanding and an indicator that UNB

awareness is growing and that our message is getting out to the right audiences. When you examine the numbers more closely you will note that applications increased on the Fredericton campus by 8% and on the Saint John campus by 13%. As was referenced earlier, the work plan for student recruitment was built on the approach of One University – Two Campuses, meaning that all recruiters have targets set for each of their high schools for each campus. This approach is further complimented this year with the move to a single Viewbook for use across Canada (as opposed to a viewbook for each campus)

Conversion Rate

Moving student applications forward to become enrolled students is what is meant by conversion rate in this context. This is one of the most complicated stages of the recruitment cycle since it requires the involvement of Admissions, Faculties and ongoing nurturing of the relationship by the recruitment team. Adding to the complexity is the fact that students are applying to university earlier than ever, expect faster and more complete information in a manner that is convenient for them and are often looking at more than one university. For example 55% of Fall 2016 applications for Engineering in Fredericton were received by December 15, 2015. Those hundreds of students had a full eight months between their application and an arrival on campus – time to consider and reconsider their options. And of course if they applied to more than one university they would continue to be recruited by those others to which they had applied.

Our university-wide conversion rate of 43.74% is up slightly over the 2015 base year rate of 43.05% but well below the goal of 47%. The campus specific rates show an increase of 2% for Fredericton and a decrease of 3% in Saint John. Obviously there is more work to be done here and detailed examination and planning is required across the main groups that have responsibility.

A significant challenge is that the conversion rate is a lag measure, meaning that we conclude what our rate is based on the math between applications and final enrolled numbers – too late to affect the current year's intake. The inability to determine conversion performance in real time results in plans for this year being developed on results from last year.

Enrolment

Our first year High School and Transfer enrolment number for Fall 2016 is 1704, up 110 students from 2015. Converting at a rate of 43.74% has produced a lower yield on enrolled students and is off significantly from the goal of 1880. Continued aggressive recruiting is required, as well as stronger performance on the conversion of those applications.

Examination of the two categories separately shows first year and transfer student enrolment numbers at UNB have increased by 1.7 and 15.4 per cent respectively. Fredericton enrolment is up 113 students while Saint John is down 3 students, when compared to the 2015 final enrolment numbers.

The increase in transfer students may be attributed, in some measure, to the provincial TAB program but additional examination is required to confirm this.

UNB	2015 - Oct 1 (Base)	2016 - Target		2016 - As of Aug 28		2016 - Oct 1	
Apps	3703	3999	8%	4059	10% (1)	3896	5% (1)
Apps - Admit	74.62%			76.25%		76.95%	
Admit	2763			3095	12% (1a)	2998	8.5% (1a)
Admit - Enrol	57.69%					56.84%	
Enrolled	1594	1880				1704	6.9%
App - Enrol	43.05%	47.00%				43.74% (2)	

NOTES:

(1): The decrease in applications between the August 28 data (pulled from the Admissions Working Cube) and the October 1 data (pulled from the Admissions Cube) is due to the following:

- a. October 1 data excludes those students who enroll on a part-time basis.
- b. Students will apply to both campuses and often hold acceptances to both campuses. These students will appear as an active app and admit for both campuses however once the student enrolls the app for the other campus is moved to a 'choice 2' and will no longer appear in the data.
- c. Students who are not able to complete the application for the fall term, or who are not able to make it to UNB for the fall term, will move their application for a later start term.

(1a): The decline in admits between Aug 28 and Oct 1 data is again due to the elimination of those who enroll on a part-time basis and the clean of up apps to both campuses as noted above.

(2): Application to conversion rates were up in FR from 42.66% to 44.83% but down in SJ from 44.08% to 40.87%. Further investigation into who converted and to which programs is required.

International

Similar to the Domestic recruiting objectives, the International Recruitment Centre set aggressive goals for 2016, 2017 and 2018.

These goals for 2016 included an 8.25% increase in applications, increasing the conversion rate from Application to Enrolled to 20% and ultimately generating new High School and Transfer first year enrolment of 235.

The actuals achieved were 1122 applications, an increase of 4%, a conversion rate of 18.45% and new first year enrolment of 207.

Applications

Application levels continue to climb at the university although we did not achieve our goal of 1176 applications. Of the three broad regions we recruit from around the globe applications increased from the Americas and Africa, India and the UK Regions. The third region is Asia and applications are down slightly.

As you will have heard, UNB has established a full time recruiting office in Beijing and that, along with new agent partner agreements with New Oriental Vision and JJJ Limited (the top two recruiting firms in China), will help us boost our numbers from this important market. Part of the reason for decline in this market is due to the fact that one of our key partners, Concord Colleges of Sino-Canada, has had large drops in their enrolment at the high school level, reducing applications to UNB.

Conversion Rates

Conversion rates for applications to enrolled student were achieved at 18.45%, just slightly under our target of 20%. Performance on each campus was 25.98% on the Fredericton campus and 10.36% on the Saint John campus.

As a result of the need to apply for a student visa and study permit after being accepted by the university, often there are delays in the processing of the visas by Canadian Immigration which forces some students to move to a January entry into studies, if their chosen program has a Winter term intake. This is not always available and the students must wait a year or go elsewhere.

Enrolment

New first year high school and transfer enrolment at October 1, 2016 is 207 against a target of 235. Similar to the situation with domestic students there is need for continuous communication, reassurance and encouragement to ensure students show up in September.

One of the key strategies in place is to have international Admissions on the Spot events in key markets to speed up the admissions process and to try to lock-in the applicants through face-to-face meetings. A second initiative underway is to work with the Population Growth Secretariat in the provincial government to enhance the access to permanent residency for international students. This is one of the main reasons students are choosing Canada as a study destination and they go to the provinces with the most attractive program and that is not yet New Brunswick.

Enrolment is also impacted by decisions out of UNB's control. The recent changes to the scholarship programs in the Kingdom of Saudi Arabia have and are limiting enrolments from this once lucrative market. Student Visa and study permit application success rates vary depending on the country of the applicant and the information provided by the student applicant. We continue to foster a strong relationship with the Canadian Immigration office.

Graduate

Numbers for graduate recruiting are preliminary at this point in the enrolment cycle. Some large programs do not begin until later in October and those numbers are not included yet in the data pulled from the enrolment database.

Graduate Student recruitment set a target of 1326 applications, which was a 5% increase over the 2015 baseline year.

Actual applications were 1458, up 15.44% for the university as of October 1, 2016. Examination of the information by campus shows 1187 applications in Fredericton (up 16.14%) and 271 applications in Saint John (up 12.45%).

Enrolment at October 1, 2016 is 308, compared to 378 in 2015, however there will be more students enrolled as the fall progresses. More accurate data will be provided in November or December.

It is interesting to note that there is a shift happening in the origins of applications. Since 2013, there has been an increase in the number of international graduate applications and that trend continues this year. One of the associated challenges that comes with this rise in international applications is that the visa and study permit requirements lower our conversion of these students to enrolled status. As mentioned a more complete analysis will be provided later in the term.

Unfortunately, I am traveling in China, developing new market recruiting opportunities and am unable to attend the upcoming. I will be happy to provide clarification or responses to questions upon my return to Fredericton on October 25.

Respectfully Submitted

Lloyd Henderson
AVP- SR &SEM