

Vice-President Finance & Facilities

Annual Operations Report

2009-2010



UPEI
UNIVERSITY
of Prince Edward
ISLAND

Photo by
UPEI Photography

A Message from the Vice-President

I am pleased to present the third Annual Operations Report for the Office of Vice-President Finance & Facilities. This report highlights some of the most significant accomplishments within the last year for the VP's Office as well as for the six reporting units.

The University has experienced significant growth and development within the last decade, which has resulted in the need for greater services from Finance & Facilities. We are working with stakeholders to balance the increasing demand for services with the resources available to us in order to have the greatest positive influence on UPEI's mission of: **People; Excellence; Impact.**

Would like to thank all of those who have contributed towards our achievements over the past year. I look forward to the year ahead, working closely with our Management Team, staff, and other stakeholders to achieve the priorities and strategies identified for 2010-2011. We continue to work towards our goals, update our priorities based on stakeholder input and evolving university priorities, and improve our service delivery.

Your comments and suggestions are always greatly appreciated.

Sincerely,



Vice-President, Finance & Facilities
University of Prince Edward Island

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People Excellence Impact

Vice-President of Finance & Facilities

The Vice-President of Finance & Facilities has the following vision, mission, and guiding principles, which provide the overall direction and framework in which the VP's Office and reporting units operate:

VISION

To provide an exemplary level of service and support in all areas of responsibility and in a manner that optimizes the financial, human, and physical resources of the University of Prince Edward Island.

MISSION

To secure, preserve, and enhance the financial, human, and physical environment that supports the University of Prince Edward Island and its students, faculty, and staff in carrying out their respective missions and in achieving their goals.

GUIDING PRINCIPLES

*UPEI strives to create an environment focused on **people**, **excellence**, and **impact**. The VP's Office contributes to this vision by embracing the following six guiding principles:*

- *Strong leadership, planning, and guidance*
 - *Exemplary performance, service, and support*
 - *Optimal allocation and use of resources*
 - *Strategic organizational entrepreneurship*
 - *Effective enterprise risk management*
 - *Integrated leadership in sustainability*
-





A Sustainable Campus

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1.0 An Introduction

This Annual Operations Report for the Office of Vice-President Finance & Facilities is for the fiscal year May 1, 2009 to April 30, 2010. This report presents the responsibilities, goals and priorities, and accomplishments within the past year for the Vice-President (VP) and for each of the six reporting units (Section 2.0). Priorities for the year ahead are presented in Section 3.0. An overview of the Vice-President’s Office (VP’s Office) and the strategic planning process introduced by the Finance & Facilities Management Team, UPEI’s 2009-2010 financial overview, and highlights of growth on campus are presented in the appendices.

2.0 A Look At The Year Past

Responsibilities, goals and priorities, and accomplishments for the past year are identified for the Vice-President’s Office and for each of the reporting Units in the following sections.

2.1 Vice-President’s Office

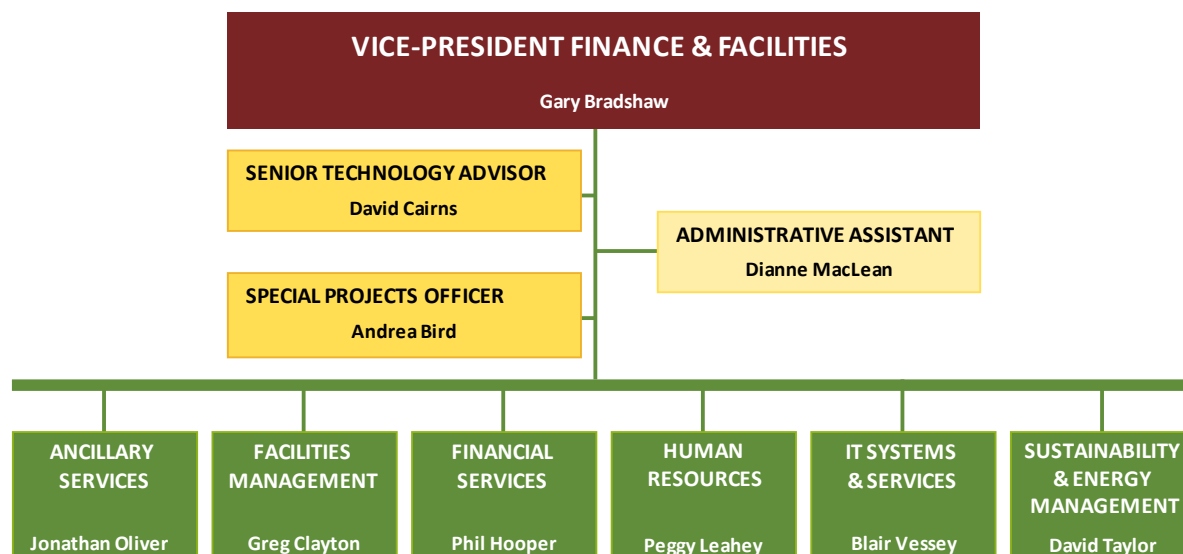
2.1.1 Responsibility

The Vice-President of Finance & Facilities provides leadership and guidance to support an environment that enables the University and its students, faculty, and staff to carry out their respective missions and achieve their goals. The VP’s Office is responsible for ten functional areas:



The VP’s responsibilities are achieved by working closely with staff and the Management Team.

Figure 1: The Office of the Vice-President Finance & Facilities Management Team



2.1.2 Goals and Priorities

Strategic goals and priorities (2009-2012) for the VP's Office are as follows:¹

Goal #1: Strategic Leadership

- *Establish and nurture a culture of strategic planning and ongoing review that ensures all reporting Units and individuals are accountable.*
- *Create and foster a service delivery culture with a strong customer focus and processes which are efficient, effective, and innovative.*
- *Provide an environment supportive of professional development and wellness at UPEI.*

Goal #2: Campus Planning and Development

- *Operate, maintain, and develop the university campus and infrastructure in a sustainable manner that is consistent with the Campus Master Plan and evolving university priorities.*

Goal #3: Financial Stewardship

- *Structure and strategically manage the University's budget to meet current and anticipated financial challenges related to revenue, expenditures, and new priorities.*

Goal #4: Sustainability Leadership

- *Develop and integrate a sustainability framework and culture within UPEI administrative and operational areas; thereby ensuring UPEI is recognized as a leader in environmental stewardship within the province and the national post-secondary educational sector.*

Goal #5: Communications

- *Communicate, in an effective manner, pertinent and timely information related to financial, human, and physical resources to appropriate internal and external stakeholders.*

2.1.3 2009-2010 Accomplishments

Highlights from the past year are as follows:

Strategic Leadership

- The Vice-President's term was renewed for an additional five years after both an internal and external review by the President.
- The first full cycle of the strategic planning process introduced in 2008 was implemented including strategic planning, success planning and review, and annual reporting processes (Appendix B).
- The Administrative Computer Applications Review Committee was formed with a mandate to review current applications, examine options, and develop recommendations for future development of administrative computer applications. The Committee included representatives from Human Resources, the Registrar's Office, Finance, IT Systems & Services, and faculties.
- The Vice-President coordinated and co-chaired the Committee responsible for overseeing the University's efforts with respect to the H1N1 pandemic and UPEI's Modified Disease Policy and for working closely with provincial and federal agencies during the outbreak.

¹ www.upei.ca/vpfinance/strategicgoals

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- The Vice-President, other VPs, and Director of Human Resources continued to implement the Professional Leadership Development Plan for UPEI directors and managers.
- A proposal was presented to the President and Vice-President, Academic for the Department of Athletics, Physical Education, & Recreation to begin reporting to Vice-President Finance & Facilities effective May 1, 2010.
- The Office and reporting units successfully supported the second week of the 2009 Canada Summer Games which was hosted on campus and took place immediately prior to the commencement of the fall academic year.
- Early stage discussions were held with regard to the renewal of the Food Services Contract, in collaboration with Ancillary Services.
- The Vice-President co-chaired the Knowledge Exchange Network project (along with ITSS) which was initiated by the University in response to the Provincial Government's *Rural Action Plan* and is intended to expand UPEI's capacity to deliver on-line learning.
- The Provincial Government's multi-year *Island Prosperity* plan continues to play an important role in the strategic direction of the University. The Vice-President continues to ensure various UPEI plans integrate with overall objectives and are in support of the province's direction.
- The Vice-President represents UPEI as a Director on the Board of Capital Area Recreational Inc. (CARI), a not-for-profit community aquatics and arena complex located at UPEI.
- The VP's Office continued to host bi-annual meetings with the City of Charlottetown to ensure strong communications and share information on projects.
- The Vice-President of Finance & Facilities and Vice-President of Research Development continued to represent UPEI on the management committee for the Centre for Bioresources and Health (CBH), along with representatives of National Research Council (NRC) and Agriculture and Agri-Food Canada (AAFC). The VP's Office coordinates the delivery of services and facility support to the NRC and AAFC presence on campus.
- The Vice-President assumed the role as Vice-President on the Board of Directors of Canadian Association of University Business Officers (CAUBO). The VP's position on the Board of Directors of the Interuniversity Services Incorporated (ISI), which supplies administrative services to nineteen Atlantic Canadian universities, also continued.

The Vice-President's Office of Finance & Facilities works to secure, preserve, and enhance the financial, human, and physical environment that supports the University of Prince Edward Island and its students, faculty, and staff in carrying out their respective missions and in achieving their goals.

Campus Planning and Development

- Implementation of the Landscape Design Plan (initiated at the beginning of the fiscal year) and the Main Quadrangle Revitalization project (completed in the fall of 2008) continued.
- All capital projects for the 2009 Canada Summer Games were coordinated and completed including the UPEI Alumni Canada Games Place and Phase 2 of the Perimeter Road.

Financial Stewardship

- The Budget Development Task Force continued, under the leadership of the Vice-President, to implement initiatives based on feedback received from campus stakeholders.
- The Office played a leadership role in the implementation of capital renewal projects funded under the Knowledge Infrastructure Program (KIP), which totaled \$4 million.

Sustainability Leadership

- Sustainability efforts continued with greater collaboration with Holland College, other regional institutions, and the City of Charlottetown.
- The Vice-President utilized his role as Director of ISI and CAUBO to promote the University's sustainability initiatives on a regional and national basis.
- Meetings with PEI Energy Systems and Maritime Electric continued in order to foster good working relationships and improve services provided to UPEI.

Communications

- The Communications Plan for the Office of VP Finance & Facilities, which was developed with input from the Management Team as well as feedback received during consultations with on- and off-campus stakeholders in 2008, continued to be a guiding document for the Vice-President.

UPEI has experienced significant growth and development in the last decade.



Finance & Facilities Management Team

Photo by UPEI Photography

2.2 Ancillary Services

2.2.1 Responsibility

MISSION

To consistently provide products and services that enhance the quality of experience that students, faculty, staff, and the broader community have at UPEI, while generating revenue in support of the Department's and University's overall financial planning. Ancillary Services strives to provide excellent customer service through professionalism, respect, loyalty, accountability, and leadership.

Ancillary Services is responsible for the following:



Residence Services Unit: works to build a safe and supportive living and learning environment that facilitates academic success, social interaction, and personal growth.

Food Services: manages food services contract and overall responsibility for campus locations including Wanda Wyatt Dining Hall, the AVC Café, the Courtyard Café, and Samuels in the Robertson Library. Catering is also available to campus and off-campus clients through the food service provider.

Conference and Special Events Services Unit: responsible for coordination of local, regional, and international events, conferences, and meetings held at UPEI by on- and off-campus clients.

Bookstore Unit: manages staff, merchandising (textbooks, clothing, and other supplies), and other operations of the Bookstore located on campus as well as the on-line store.

Ancillary Services is also responsible for vending machines located on campus and campus cards.

2.2.2 Goals and Priorities

Ancillary Services' 2009-2012 goals and priorities are summarized below.²

Goal #1: Financial Stewardship and Revenue Growth

- Achieve a 95% overall residence occupancy; increase annual revenue from residence, food, and conference operations to \$7 million; and achieve breakeven status by 2013.
- Meet or exceed financial targets outlined for the Bookstore in the UPEI 2009-2010 operating budget and develop a long-term plan for annual growth in sales.
- Develop a deferred maintenance plan by December 31, 2009.
- Implement appropriate recommendations made by the Canadian College and University Food Service Association's Visiting Directors Evaluation Report of food service operations at UPEI and recommendations identified in Unique Venues' report for Conference Services.

² www.upei.ca/residence; www.upei.ca/conference; www.upei.ca/bookstore; www.dineoncampus.ca/upei

Goal #2: Marketing and Communication

- *Develop and implement a plan, in consultation with Integrated Communications, to enhance the effectiveness of marketing and communications for each reporting Unit.*
- *Implement appropriate recommendations made in the external consultant's review of marketing and communications for Conference Services and Food Services.*

Goal #3: Customer Service and Satisfaction

- *Create and foster a customer-focused, team-oriented working environment.*
- *Develop a structured customer engagement plan that solicits ongoing feedback from customers and implement plan in 2009-2010 using benchmarks and annual comparisons.*
- *Improve customer service to conference clients by directly managing all aspects of UPEI services through a "one-stop-shop" model starting in the fall of 2009. (Completed in 2009 for external clients.)*
- *Create and foster a living and learning environment within residence that contributes to, and improves upon, residence recruitment and retention and student satisfaction with particular focus on support needed for international students.*

Goal #4: Strategic Initiatives

- *Develop an improved model of staffing and service for the provision of cleaning, maintenance, and utility working in collaboration with Facilities Management.*
- *Develop a vision (in collaboration with Vice-President of Finance & Facilities) for Food Services at UPEI and evaluate the potential for establishing a "UPEI Food Service" brand.*
- *Maximize efficiency through the most effective use of existing and new technology.*
- *Develop a model for Campus Card that improves integration of services and allows the card to be financially self-sufficient within a reasonable time frame.*
- *Make a decision on potential renewal of Chartwells' food services contract to expire in April 2010 and manage negotiations of any contract/tender process thereafter.*
- *Develop new, and enhance existing, emergency preparedness and business continuity plans.*
- *Identify and implement risk management initiatives and review strategies and policies on an as needed basis, as part of UPEI's increasing efforts on risk management.*
- *Update policy on use of space by internal and external clients and develop policy related to the sale and distribution of food by faculty, staff, and students to minimize associated risks (in collaboration with Financial Services).*

2.2.3 2009-2010 Accomplishments

Ancillary Services' most significant accomplishments during the past year are identified below.

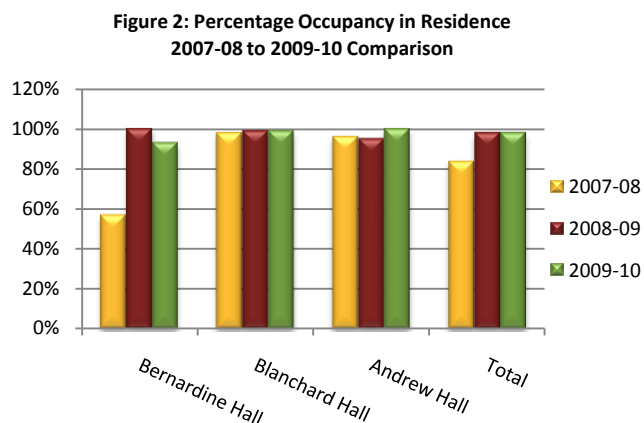
Strategic Leadership

- The Residence Manager also became the Interim Director of Ancillary Services as of the end of 2009.
- Changes have taken place with the position of Residence Life Coordinator which was filled with a full-time individual as of March 2010.
- Ancillary Services revenue continued to increase and reached \$8.2 million, including the Bookstore (Appendix C) in 2009/2010, which is 7.5% higher than the previous year. Revenue for residence, food, and conference services (excluding the Bookstore) was \$5.6 million: 80% of the goal for 2013.
- The Department is ahead of goals set in the business plan for residence, food, and conference services including an accelerated decrease in long-term debt.

- Breakeven status was achieved for the second consecutive year.
- The Residence Manager, Residence Life Coordinator, and Director attended the Atlantic Association of College and University Student Services (AACUSS) conference in Nova Scotia, the Director attended the annual Canadian College and University Food Service Association (CCUFSA) conference in Newfoundland and Labrador; an employee of Conference Services attended the Canadian University and College Conference Organizers Association (CUCCOA) in Ontario; and the Residence Manager attended the Canadian Campus Card Workshop in Ontario.
- Preventative measures were implemented as a result of the H1N1 pandemic and will continue.

Residence Services

- The goal to exceed a 95% overall occupancy has been achieved (Figure 2).
- The percentage of students that applied for second year of residence increased by 8% to 57%, from the previous year. The percentage of residence students from last year who have confirmed residence for the upcoming fall increased from almost 34% to 36%.



- A new process, which includes an on-line tutorial and quiz, was introduced to provide judicial support for assisting students in living in a community environment and was recommended based on its success at another Atlantic Canadian university.
- International students represented 14% of the residence population, which is comparable with the previous year.
- The second annual Residence Recognition Night, which recognizes students who have contributed to the residence community, was held in March.
- The annual Residence Energy Challenge, held in collaboration with the Manager of Sustainability & Energy Management, was held for the second year and was introduced at other Maritime universities.

Food Services

- Samuels Coffee Kiosk located in the Robertson Library experienced its first year of operations.
- The Wanda Wyatt Dining Hall no longer uses food trays, resulting in a savings of approximately 3 million litres of water, which had been used to clean trays, from September 2009 to April 2010.

UPEI conserved almost 3 million litres of water from trayless food services at the Wanda Wyatt Dining Hall. This is enough water to fill the entire Wanda Wyatt cafeteria to a height of 2.1 meters.

- The Residence Food Committee was established as a recommendation of the Canadian College and University Food Service Association's Visiting Directors Evaluation Report to build relationships with Chartwells Food Services. The Committee, made up of students, provided a number of suggestions

on the weekly residential dining menu options. Chartwells Management responded by altering the scheduled menu choices to meet student requests. Chartwells has been responsive to the Committee's feedback as well as to comments received through "Let's Talk" board on its web site.

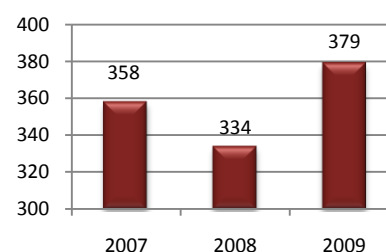
Conference Services

- More than \$1 million in revenue was generated during this record year with 125 conferences, meetings, and events hosted on campus compared to 100 in 2008-2009. These events required accommodation, meeting, and food and beverage services. Clients included Skills Canada, National Cadets Marksmanship Championships, Canadian Junior Track and Field Championships, Dieticians Association of Canada, Canadian Youth Against Impaired Driving, Canadian Animal Health Laboratory Network, and 2009 Canada Summer Games.

2009-2010 was a record year for UPEI with 125 conferences, meetings, and events held on campus. Ancillary Services is working hard to achieve an annual revenue target of \$7 million for residence, food, and conference services.

- The number of annual events held on campus, which involved some level of service provided by Conference Services, was strong during the calendar year 2009, with an increase of almost 6% from 2007 (Figure 3).
- Through Conference Services, Chartwells was contracted to provide food services including three meals a day to more than 2,500 athletes and coaches in the Wanda Wyatt Dining Hall during the 2009 Canada Summer Games. The Residences was asked to provide accommodations for 2,372 Canada Games participants.
- May to August room occupancy was greater than during the previous year. The record month, August, experienced a 91% occupancy compared to 75% in 2008.
- A "one-stop-shop" model whereby staff directly manages all aspects of UPEI services was introduced to improve customer service to external conference clients.
- Marketing portfolios and electronic room keys were launched with the new branding developed in collaboration with Integrated Communications.
- Sixty-six (66) bunk beds were purchased for \$5,000 to accommodate larger and more groups.
- Membership in Meetings Prince Edward Island continued and in collaboration with Meetings PEI, the Manager participated in a Religious Leadership Tradeshow in Texas.
- The Manager participated in the Hospitality Sales and Marketing Association International (HSMIAI)'s Affordable Meetings - Meeting Planner Conference and Trade Show in Washington, DC, which was a recommendation of the Unique Venues' Report for Conference Services at UPEI.

Figure 3: Annual Events Held on Campus
(Based on Calendar Year)



Bookstore

- The annual increase in gross revenue was 11%, which is higher than the 3% for the 2008-2009 fiscal year. Increased enrolment has contributed to a large percentage of the revenue growth, as is suggested by the large percentage increase in revenue from textbooks.

UPEI Bookstore	2007-2008	2008-2009	2009-2010
Books	\$1,695,974	\$1,789,121	\$2,023,471
Clothing	259,308	257,228	250,827
Office Supplies	210,231	198,818	232,531
Other	<u>166,125</u>	<u>158,588</u>	<u>164,103</u>
Total Gross Revenue	<u>\$2,331,638</u>	<u>\$2,403,755</u>	<u>\$2,670,932</u>

- Financial targets identified in the 2009-2010 UPEI Operating Budget were exceeded.
- The Used Textbook Buyback Program was expanded to four times a year (January, April, September, and December) resulting in 1.2 times more dollars (a total of \$63,400) given back to students for the purchase of their used books. Half of the used books purchased from students was resold through the Bookstore at a 25% savings to students. Commission was also received from used books sold outside of the Bookstore.
- A new look at the Bookstore included fresh paint using UPEI colours, placement of large UPEI logos, new signage for textbooks and fitting room, and new tile flooring and carpet.
- Upgrades to Point-of-Sale system included new merchandise scanning capability (only textbooks could be scanned using the barcode previously) through IT Systems & Services, a barcode printer for labeling merchandise, and conversion from phone to network connections for debit/credit card machines as improvements to customer service.



University of PEI. The place to be.



2.3 Facilities Management

2.3.1 Responsibility

MISSION

To serve the university community through the planning, design, construction, operation, protection, and maintenance of its physical facilities, and to provide direction and support to senior administration in planning of deferred maintenance, enhancement of buildings, and new capital investment in facilities.

The areas of responsibility for Facilities Management are as follows:



Capital Projects Division: responsible for capital planning, design, and construction delivery for new construction and renovations and for managing relationships with external engineers and technical support. Responsibilities also include producing and maintaining accurate drawings and information for all UPEI facilities and signage.

Maintenance Division: responsible for repairs and maintenance of buildings, grounds, equipment, and department vehicles. Staff provide internal and external delivery services, room setups, and other event support. The Division is also responsible for the electrical distribution system, building heating systems, interior and exterior lights and controls, and management of efficient usage.

Custodial Services: responsible for the cleaning of all building across campus including the AVC animal healthcare areas, campus labs, and classrooms.

Security Services Division: responsible for the safety of students, faculty, staff, and visitors, and for providing a secure environment within the university campus. This division is also responsible for building access control and the communication and enforcement of parking regulations and the 24-hour security line and alarm monitoring centre.

Special Projects: UPEI's Accessibility Audit Plan, Landscape Design Plan, Capital Asset Plan, signage wayfinding plans, classroom audits, as well as various other projects.

2.3.2 Goals and Priorities

The 2009-2012 goals and priorities for Facilities Management are summarized below.³

Goal #1: Strategic Leadership

- Implement multi-year strategic planning process including development and implementation of a strategic plan and the Success Planning and Review Process.
- Incorporate a culture of responsibility and accountability within the leadership team and for the deliverables and timelines identified in their respective plans.

Goal #2: Campus Planning and Development

³ www.upei.ca/facilities

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- *Complete a comprehensive deferred maintenance and capital asset plan and present it to the Property and Assets Committee by April 2011.*
- *Complete physical assessments of all buildings on campus to provide detailed information on the condition of each system and develop a five-year project plan.*
- *Enhance the condition of grounds by implementing the Landscape Design Plan.*
- *Increase access for people with disabilities by implementing priority recommendations as identified in the seven-year Accessibility Audit Plan.*
- *Improve the Globe and Mail – Attractiveness of Your Campus rating from “B” in 2007 to “A” by 2013.*
- *Develop and implement a campus-wide community-based security model with policies and procedures developed and technology requirements and community partnerships identified in year one. Year two will focus on plan implementation.*

Goal #3: Communications

- *Enhance and promote existing Facilities Management web site and encourage greater campus usage by 20% by June 2012. Enhancements to include project updates, an on-line query, and a Q&A section.*

2.3.3 2009-2010 Accomplishments

Facilities Management’s most significant accomplishments during the past year are identified below.

Strategic Leadership

- The Success Planning and Review Process was introduced to the management team.
- Waste management guidelines were developed in collaboration with the Office of Sustainability & Energy Management.
- Management and implementation of energy guidelines developed by the Office of Sustainability & Energy Management and Sustainability Advisory Committee commenced.
- Allocation and management of internal resources continued to be a priority in order to meet the demands of the growth and development on campus. For comparison, the gross square footage of the buildings has increased by 30% within the last decade (Appendix D).

The University has experienced tremendous growth in the last decade. Today, the square footage of campus buildings is 30% greater than 10 years ago.

Capital Planning and Implementation

- Phase 3 of the Atlantic Veterinary College (AVC) expansion was completed in August and included renovations and an expansion of the Aquatics facility and a new Learning Commons.
- The first signage project for Main Quadrangle was completed as part of the wayfinding plan (2008) that incorporates the guiding principles of UPEI’s Campus Master Plan (2004) and Landscape Design Plan (2007). Standards identified in the Landscape Design plan continue to be implemented.
- Planning and design work for the new building for the School of Nursing, Family, and Nutritional Sciences began this year and included the external consultant engaging users in the planning process. The new building will be located in the Quadrant bounded by Main Building, W.A. Murphy Student Centre, Chi-Wan Young Sports Centre, and Central Utility Building.

- In preparation for the 2009 Canada Summer Games, operational and capital requirements for on-campus development and event hosting were identified and UPEI Alumni Canada Games Place track and field complex and clubhouse were constructed.
- The new water connection to Mount Edward Road was completed in the spring with funding assistance through the Federal Government's Knowledge Infrastructure Program (KIP). Roofing, service tunnel restoration, elevator upgrade, sprinkler installations, and mechanical system upgrades are among the other capital renewal projects funded under KIP.
- Upgrades and installation of new fire alarm systems were made across campus with KIP funding. Speakers were installed as alarm devices allowing for campus-wide communication in case of an emergency situation. Final installation and programming will be completed in summer 2010.
- Other campus developments include Bernardine Hall washroom exhaust, Library Learning Commons, air conditioning at the Wanda Wyatt Dining Hall, flooring and painting at the Sports Centre, development of Ring Road Phase 1, a new horse grazing building at the AVC, and the removal of the Classroom Centre.

An indicator: The Globe and Mail – *Attractiveness of Your Campus* rating for UPEI increased from “B” in 2007 to “A-” in 2009. This rating is closer to Facilities Management’s strategic goal of an “A” rating by 2013.

Capital Renewal

- The facility condition assessment software was implemented and will keep records of facility condition data for buildings and grounds, generate building condition reports including the Facilities Condition Index (FCI), and provide useful information for capital planning. The goal is to have the software populated with detailed data for all UPEI buildings by December 2010.

Security and Safety Management

- A safety manual was prepared and safety program was enhanced to include new measures such as roof fall protection, confined space planning, and mould remediation procedures; a hearing conservation plan; and a drivers' safety policy and training program. A review is currently underway for identifying solutions and costs for fall protection systems as well as enhancements to the hearing protection program in consultation with external expertise.
- Staff safety training continues to be a priority. Eight safety courses were offered this year including basic spill responses, first aid, driver safety, transportation of dangerous goods, Workplace Hazardous Materials Information Systems (WHMIS), and soft tissue injury prevention. Seventy-four people attended these sessions which took place over a total of 224 hours.
- Security Services worked with the RCMP and Charlottetown Police to begin implementation of the School Actions for Emergencies (SAFE) program. Activities included completing the RCMP SAFE Report, which is housed on a secure national police database. The University's "Lock Down" Policy was drafted and included the coordination of "Lock Down" alarms with other provincial secondary and post-secondary facility plans. A tour of all buildings was completed and safe rooms identified. Security staff received SAFE training, and additional training on campus is planned in collaboration with the Charlottetown City Police and the RCMP.

Maintenance and Operations

- Fourteen maintenance and nine utilities staff provided services across campus and are responsible for the 1.2 million square feet of buildings and the 137 acres of grounds at UPEI.
- Work orders increased by 2% to 6,650 from the previous year and by 25% over the past two years and took an average of 2.3 hours each to complete. Almost 15,000 deliveries, an average of 61 per day, were made on- and off-campus, which is a 2% increase from last year.
- Working in collaboration with the Office of Sustainability & Energy Management, a new solar powered club car was piloted on campus with the objective of finding a more environmentally friendly fleet for UPEI.
- Collective bargaining negotiations continued with unions representing Facilities Management staff.

Custodial

- Forty-two staff provided custodial services on campus within the 1.2 million square feet of buildings.
- Significant work took place in preparation of, and following, the second week of the 2009 Canada Summer Games. Staff worked diligently to prepare the campus for the fall academic semester, which was delayed due to the timing of the Games.
- Pandemic cleaning standards were developed and implemented including frequent hand surface cleaning and the installation and maintenance of hand sanitizers located in all buildings and residence as a preventative safety measure at the time of the H1N1 outbreak.

Accessibility Audit Plan

- The fourth year of implementation of the seven-year Accessibility Audit Plan took place jointly with the Access-Ability Committee. A new accessible ramp, washroom upgrades, visual strips on stairway treads, and other improvements were made in Main Building, Robertson Library, Kelley Memorial Building, Memorial Hall, Cass Science Centre, K.C. Irving Chemistry Centre, Duffy Science Centre, Steel Building, W.A. Murphy Student Centre, Wanda Wyatt Dining Hall, and Central Utility Building.

Communications

- Web site enhancement planning continued over the past year. The goal is to coordinate the web site design and appearance with the reporting units of Finance & Facilities and improve communications with the campus community. Data on the number of web site visits is being collected for this base year to measure the success of this initiative over the next two years.



An enjoyable student experience.

Photo by UPEI Photography

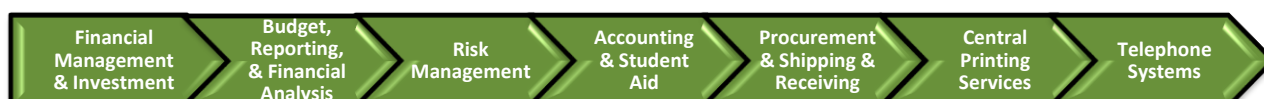
2.4 Financial Services

2.4.1 Responsibility

MISSION

To support and promote the University's mission by providing financial leadership in business strategy and processes.

Areas of responsibility for Financial Services are as follows:



The Comptroller's Office: responsible for financial management of the University including budget, financial systems, insurance, procurement, as well as investment and risk management. The Unit maintains a repository of university contracts, memorandum of understandings, and agreements and supervises the approval process. It also maintains a database of official university policies and the on-line policy manual.

Budget and Financial Analysis: responsible for preparation of financial statements, liaison between UPEI and external auditors, and internal and external financial reporting (Appendix C). This unit ensures financial management systems are in accordance with generally accepted accounting principles (GAAP) and prepares, monitors, and enforces budgets approved by Board of Governors.

Risk Management and Business Planning: provides leadership in university risk management by assisting in identification of risks and working with departments to mitigate risks. This unit conducts reviews of systems, processes, and procedures to test internal controls and compliance with policy and procedures and coordinates the development and approval of new and amended Official University Policies.⁴

Accounting Office: responsible for business operations including accounts payable, accounts receivable, financial data administration, payments and deposits, student accounts, and financial administration of research accounts. The Office maintains the University's financial information system with support from IT Systems & Services. It is the primary contact for students on financial matters including student loans and provides support to all departments on campus on financial processes.

Procurement Services: responsible for purchasing, central shipping and receiving, and mail services, as well as the campus phone system. The unit handles all procurement functions including tendering, bulk orders, quotations, supplier selection, and international brokerage.

Central Printing: responsible for photocopy and printing services provided on campus including brochures; business cards; colour copying and binding; and collating course packs. This unit also manages the public copier services provided in the Library and AVC.

⁴ www.upei.ca/policy/

2.4.2 Goals and Priorities

The following 2009-2012 goals and priorities were identified for Financial Services:⁵

Goal #1: Communications and Productivity Enhancements

- *Improve communication within functional Units, with the campus community, and with clients in general.*
- *Improve effectiveness of systems and processes.*
- *Develop a document management and archiving plan for Financial Services.*

Goal #2: Reporting

- *Improve timeliness in the preparation of the University's Financial Statements, Annual Budgets, and other reports, as required.*
- *Improve the Financial Information System by working closely with IT Systems & Services in the development of programs: (1) to make the system more user friendly; (2) to improve documentation of programs; and (3) to improve the flexibility of reporting tools.*

Goal #3: Risk Management

- *Improve risk management practices for the University.*
- *Develop a risk management profile for each reporting office and develop risk management strategies and policies to manage campus-wide exposures.*

Goal #4: Leadership

- *Develop and support a training and professional development plan for managers and staff in Financial Services.*
- *Support the strategic priorities of the University and improve the financial and administrative systems to support the growth in research at UPEI.*

2.4.3 2009-2010 Accomplishments

Financial Services' most significant accomplishments during the past year are identified below.

Strategic Leadership

- Bi-weekly meetings of the Managers continued and were expanded to include Finance Officers.
- The Research Accounting Unit of the Accounting Office was reorganized to meet the needs of a growing research program at UPEI.
- Various management staff attended national and regional meetings including:
 - CAUBO national meetings in Ottawa, Ontario;
 - Atlantic Associations of Universities Finance Officers (AAUFO) meeting in St. Ann's, Nova Scotia;
 - Risk management seminars and meetings; and
 - Procurement regional meetings.
- The web site was expanded to include policies, procedures, and commonly used forms.
- Success planning and review process was introduced to Unit Managers.

⁵ www.upei.ca/vpfinance/comptroller/procurement/

www.upei.ca/accounting/

Financial Governance and Budgeting

- Support was provided for budget planning projects such as paper and printing reduction, travel and entertainment policy, and student payment methods initiated by Budget Development Task Force.
- A lead role was played in the revisions made to UPEI's investment and administration policies for endowments. An annual report of Endowments and Special Purpose Funds was prepared.
- Monitoring of assets and liabilities of the pension plan continued and the Pension Status Report as at April 30, 2009, was prepared and presented to the Finance and Audit Committee of the Board.
- A tender for debt servicing was issued, and swap loan financing was obtained from the Bank of Montreal for debt to be funded by the Province; KIP funded capital renewal projects and the new School of Nursing, Family, and Nutritional Sciences building; and AVC debt for its expansion.
- A three-year budget estimate was prepared and presented to the PEI Government. A special report on the UPEI Pension Plan was also presented to the Province.
- Special finance assignments undertaken throughout the year included:
 - Participation in the Scholarship Umbrella Committee mandated to review the current university-wide scholarship, award, and endowment management processes.
 - Special financial analyses support provided to the Department of Athletics, Physical Education, & Recreation to manage budget issues and improve processes.
 - Preparation of revised budgets and detailed analysis of costs related to the re-organization of Student Engagement, Advancement, and Integrated Communications.
- An in-depth review of Research Accounts in debit balance was coordinated in response to the University auditors' recommendation and resulted in the need for an annual compliance review.
- Training in budget preparation and use of the University Information System (UIS) were provided to Department Heads and Directors as well as the Science Administrative Support Group.
- Improvements were made to the current database for more effective management of endowments with the assistance of IT Systems & Services.
- Deadlines for preparing financial reports (e.g., Consolidated Financial Statements, Pension Plan Financial Statements, Annual Registered Charity Information Return and Registered Pension Return, CAUBO Reports, 2010-2011 Operating Budget, and 2008-2009 Operation Budget to Actual Report) of the University were met or exceeded. Other financial reporting requirements were met on schedule including taxes and Statistics Canada reporting.
- The Comptroller reported detailed financial information to the newly constituted Finance and Audit Committee of the University's Board of Governors.

Procurement and Related Services

- The level of service provided continued to increase:
 - Approximately 10,250 purchase orders were generated with a value of \$51 million. Research grants and contracts accounted for 30% of purchase orders processed, which is a 3% increase over the previous year.
 - Forty-four (44) tender processes were managed with a value of \$8 million.
 - Campus phone system support increased by 13% with over 700 service orders handled.
 - Mail Services processed more than 100,000 thousand outbound mail pieces, as well as inbound and internal mail distribution.
 - Central Receiving received and distributed over 39,000 courier and freight pieces, a 3% increase from the previous year, and approximately 5,500 outbound shipments.
- The new Procurement Policy was approved by the Finance and Audit Committee of the Board.

- Procurement and Accounting staff attended seminars and training workshops on changes made to Customs Clearance and the development of a customs manual was initiated.
 - Significant improvements in service to cell phone and other wireless communication devices on campus were implemented, working closely with the telephone services provider.
-

The identification and management of risks across the campus are priorities for the University of Prince Edward Island and Financial Services.

Accounting

- Approximately 3,350 active general ledger accounts, 8,900 cheques, and 7,600 direct deposit payments were processed.
- The Committee established to facilitate UPEI's decision to cease accepting credit card payments for tuition, residence, and fees effective July 2010, met several times and improved on, or initiated, systems to ensure alternate payment methods are in place. A communication plan was developed to advise students of this change and their alternative payment options.
- Administrative changes were incorporated into the US student loan process as a result of the US Government's decision to play a greater role in the disbursement of US student loans.
- Work began on developing the UPEI document imaging system to be piloted with Accounts Payable.
- Research Accounting Unit's organizational structure and location changed in order to meet the growing needs of UPEI's research program, promote stronger ties with the Office of Research Development, and streamline the management structure.

Risk Management and Business Planning

- A mechanism for policy development, amendment, and approval was formalized and the Unit became responsible for developing and revising university policies including University Signing Authorities; Procurement; Alcohol Safety; Policy Writing; Contract Research; Pension Investment; Endowment Investment; Conflict of interest in Research; Animal Care; Violence prevention; Traffic and Parking; Fund Raising; Gift Acceptance; Commercial Enterprises; and University Centres.
- Campus systems (e.g., petty cash and fee for service) and Department of Athletics, Physical Education, & Recreation were reviewed and recommendations were provided.
- The development of a Risk Management framework for the University was initiated.
- Risk management profiles were developed for Finance & Facilities Departments that identify risks rated based on impact and likelihood. Process was initiated with other departments, faculties, and schools. Risk management consultations were held with departments involved in student practicum placements with the goal of developing uniform policies, procedure, and risk avoidance strategies.
- The Electronic Document Management (EDM) Committee drafted and issued a Request for Information on EDC processes, evaluated the results, and commenced implementing a solution.
- The new Procurement Card and Corporate Card Program was launched.

Central Printing

- Revenues from public copiers in the Library and AVC declined by 25% from almost \$22,300 in 2007-2008 to \$16,700 2009-2010; this decline is a direct result of sustainable efforts made to reduce the use of paper. During the same period, general copying service revenues in Central Printing increased by 17% from approximately \$184,700 to \$215,400.

2.5 Human Resources

2.5.1 Responsibility

MISSION

As an active partner, we will further the strategic mission of the University by providing exceptional human resources leadership and management. We will impact the University by fostering a positive, safe, and healthy environment that attracts, retains, and inspires excellence in people.

The areas of responsibility are as follows:



Employment Services: responsible for staff recruitment and selection, employment protocols, coordination of government employment initiatives, administration of personnel transactions, contract administration, position descriptions, job evaluation, and service awards.

Employee Services: responsible for administration of leave and attendance, faculty and staff group benefits, the UPEI Health Trust, the UPEI Pension Plan, and group RRSP Compensation, and providing support for campus wellness initiatives and HR information systems.

Health and Safety, Emergency Planning and Response and Biosafety Services: responsible for development, maintenance, and compliance of UPEI's related policies and programs, working in collaboration with local and regional regulatory authorities and UPEI committees.

Payroll Services: responsible for administering payroll for faculty, staff, and UPEI related operations, liaising with provincial and federal regulatory authorities, maintaining employee information, and assisting faculty, staff, and students with a variety of employment related requests.

Labour Relations and Collective Bargaining: responsible for establishment, participation, coordination, and support for all bargaining tables, as well as administering grievance actions and responses and providing advice and assistance on employee and labour relations matters.

Organizational Planning and Development: responsible for providing leadership, assistance, and resources with respect to leadership development, training needs, and organizational reviews.

2.5.2 Goals and Priorities

The following 2009-2012 goals and priorities were identified for Human Resources:⁶

Goal #1: Build a Client-Oriented, Service-Focused Culture

- *Build and support a risk-management culture.*
- *Develop and improve the effectiveness of Human Resources systems.*
- *Assess service delivery.*
- *Celebrate faculty and staff achievement of service milestones.*

⁶ www.upei.ca/humanres

- *Improve the turnaround and general service delivery in staffing, HR, payroll, and health and safety.*

Goal #2: Provide Exceptional Value to the University

- *Develop and implement the employee Success Planning and Review Program.*
- *Establish and deliver an orientation program for staff.*
- *Review existing policies and develop new human resources-related policies that improve the effectiveness of campus operations.*
- *Establish and implement a leadership development program.*

Goal #3: Create and Implement a Communications Strategy for Human Resources

- *Develop a formal departmental communications plan.*
- *Increase Health and Safety Communications.*
- *Enhance communication tools and methods.*

Goal #4: Make UPEI the University Of Best Practices

- *Integrate health, safety, and wellness into the university culture.*
- *Further develop and refine Emergency Preparedness Measures.*
- *Support harmonious relationships with faculty and staff.*
- *Support the Professional Development of HR Department staff.*

2.5.3 2009-2010 Accomplishments

Human Resources' most significant accomplishments during the past year are identified below.

Strategic Leadership

- Focus groups held with Assistant and Associate Deans, Directors, and Administrative Assistants and one-on-one discussions with Deans and Vice-Presidents resulted in several recommendations, many of which have already been implemented while others are a work-in-progress. Examples include development of an orientation session and information packages for new employees, communications direct to support staff, and introduction of electronic competitions.
- Potential HR-related risks were identified, categorized, and evaluated for level and probability using the ISI risk management program to improve effectiveness of HR systems.
- The Director of Human Resources acted as a resource to the Board of Governors' HR Strategic Standing Committee (which approves appointments and approves HR policies and terms of employment for Senior Management and other key personnel); co-chaired the Health and Safety Steering Committee; acted as spokesperson at four negotiation tables; and sat on the Infectious Disease Planning Committee, Emergency Operations Team, Board Pension Advisory Committee, Pension Investment Review Committee, Joint Benefits Advisory Committee, Wellness Initiative; and UPEI Health Care Trust.
- The Success Planning and Review model was developed and piloted within Finance & Facilities Departments. Professional and personal development goals were incorporated into individual success and review plans. Feedback received will be incorporated prior to a campus-wide roll-out.
- Campus sustainability efforts were promoted in HR by starting a practice of double-sided photocopying; increasing use of electronic reporting and computers rather than paper; launching electronic competitions for staff and student hiring competitions; following campus energy plan with respect to room temperature; and recycling binders, envelopes and obsolete letterhead.

- Campus sustainability efforts (e.g., paper reduction and energy conservation) were promoted.
- A savings in premiums were provided to faculty and staff for travel services.
- CAUBO Faculty Bargaining Services workshops, employee benefits workshops and conferences including ISI semi-annual meetings, EMO Emergency Operations Training, and other HR-related training and development opportunities were provided to staff.
- Organizational Leadership Development emerged as a university-wide priority and through a collaborative approach across campus. Examples include health and safety, wellness, and on-line computer training through training IT Systems & Services.
- Staff participated in training for webpage development (DRUPAL) and reporting from information systems (Hummingbird).

The HR Department has been actively seeking feedback on its services from UPEI faculty and staff and will continue to implement recommendations.

Leadership and Human Resource Development

- Presentations were made at the following events within the past year:
 - The second annual Retirement Planning Workshop for faculty and staff.
 - The second annual Service Recognition Award Celebration held in conjunction with the Presidential Annual Update.
- The second year of the VP's Lunch and Learn Program for directors was expanded to include managers. Six sessions were held, with a combination of leadership development, operations-related topics, and networking/practice sharing opportunities.
- Ninety-nine (99) faculty and staff enrolled in credit courses under the UPEI Tuition Waiver Policy, increasing from 72 individuals during the previous year and resulting in an increased investment in tuition to the value of \$30,000 to \$45,000.
- New policies were identified and developed in collaboration with the Manager of Enterprise Risk Management, including employee background checks, travel, confidentiality agreements, exit protocols, hearing conservation, decommissioning a laboratory protocols, and biosafety orientation.

Human Resource Information System and Payroll

- A number of internal improvements, streamlines, and upgrades were made to HR systems including the extended use of electronic reporting for hours and overtime as well as Records of Employment and introduction of an electronic competition system for file sharing and applicant review and assessment. These initiatives have improved processing time and accuracy. Management of HR systems was assigned to HR Project Officer, improving effectiveness of upgrades and tracking.
- HR processes were mapped, tracked, and streamlined to identify potential efficiencies, improve integrity of data, and improve reporting systems (e.g., detailed salary breakdowns, detailed history display, and competition number tracking).
- Use of technology increased in order to improve response time and associated costs. Key initiatives included the introduction of the Virtual Research Environment (VRE) as well as electronic committee, project and activity management tools, such as Skype.

Staffing Services

- The number of staff competitions increased by almost 14% from the previous year. Of the 182 staff competitions and an additional 49 faculty advertisements in 2009-2010, approximately 75% were term positions and 30% resulted from research grant programs (Figure 4). The number of applications increased by almost 5% from the previous year (Figure 5).
- Student competitions decreased by almost 9% (Figure 4) and the number of applications decreased by almost 10% from 2008-2009 (Figure 5).
- A new electronic competition system has been implemented and is expected to further streamline the timeframe to fill positions.
- Academic appointment letters/contracts and processing were reviewed and standardized in collaboration with Faculty Relations Office. Administrative appointment letters were also reviewed and standardized.

Employee Services

- The employee Orientation Checklist was updated and a comprehensive UPEI Staff Orientation Handbook was developed, posted on the HR web site, and made available in hard copy to new staff.
- Premium rates for UPEI's Supplementary Health plan were constant for the third consecutive year; Life and Long-Term Disability rates increased marginally; Employee and Family Assistance Program costs decreased by 50% because of favourable rates accessed through ISI; and travel insurance decreased by 53% for staff and 46% for faculty.

Labour Relations

- Meetings were held with faculty and staff unions to address pension issues.
- Human Rights Commission public hearings regarding the complaints of three UPEI employees over the University's Mandatory Retirement Policy were held in October 2009. A decision upholding discrimination was rendered in February 2010. UPEI has filed for judicial review.
- Collective bargaining with staff groups remained on hold until late spring as unions jointly addressed pension concerns with the University. A resolution is anticipated for the summer of 2010. Negotiation dates were set with two of the four staff unions.
- The Faculty Association Unit #1 served notice for bargaining. The Collective Agreement expires on June 30, 2010. A negotiation committee has been established and planning has commenced.
- The firm HRA was engaged to provide HR consulting and bargaining to the Office, University, and HR Department.

Figure 4: Comparison of Annual Competitions Held for Staff and Students (For Fiscal Year Ended)

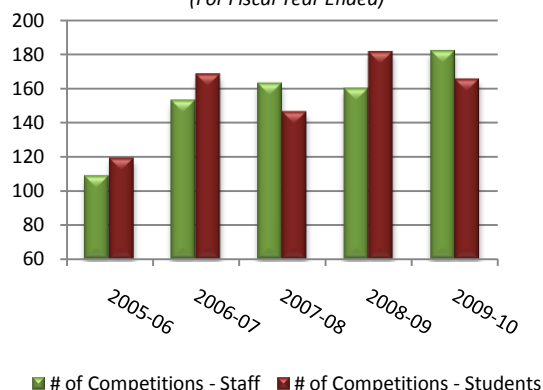
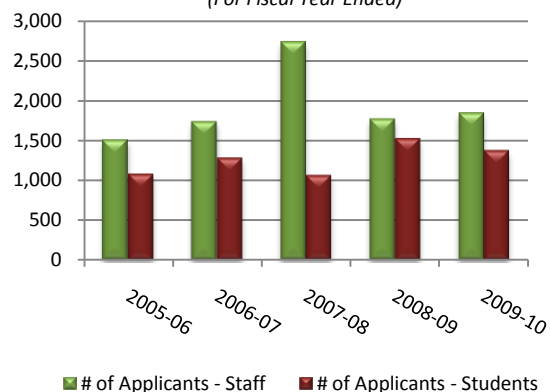


Figure 5: Comparison of Annual Applicants for Staff and Students Competitions (For Fiscal Year Ended)



- The number of grievances filed is similar to previous years. However, a larger number of UPEI Faculty Association complaints were resolved without resulting in the submission of a grievance.

Health, Safety, and Emergency Operations

- The 2009 Canada Summer Games Committee, local health and emergency response agencies, and staff collaborated on safety and emergency planning, working closely with the UPEI Safety Advisor.
- The second annual biosafety seminar for incoming AVC students (for which staff from other areas of campus were invited and encouraged to attend) took place.
- Safety inspections were coordinated with the Site Safety Committees in the Faculty of Science and Facilities Management Division.
- Emergency Evacuations plans were finalized and emergency exercises and training sessions were held with the Emergency Measures Operations Team.
- Staff participated in UPEI's Healthy Campus Workplace framework and is represented on the Healthy Campus Planning Committee.
- The Health and Safety Advisor coordinated the development of the Infectious Diseases Policy and preventative and response strategies taken to address H1N1 virus. The Pandemic Plan was revised.
- UPEI's registration under the *Human Pathogens and Toxins Act* came into effect. An on-line inventory of hazardous substances has been developed and is monitored.
- Discussions between AVC and Canadian Food Inspection Agency (CFIA) containment experts on the process of commissioning the recently constructed addition to the aquatic animal facility were held.

Communications

- Priority areas related to HR are being developed based on the 2010 communications plan prepared for the VP's Office of Finance & Facilities.
- A communications plan for UPEI labour relations was prepared, which includes establishment of a communications committee and identifies a spokesperson and message topics.
- An HR newsletter devoted to campus health and safety and to biosafety resources was published.
- Web sites for emergency preparedness and biosafety were established, and VRE site resource, inventory system, documents, and information exchange were also established.
- Twenty-three (23) level 2 laboratory spaces/suites (14 of which were new certifications) were inspected, successfully obtaining compliance with federal government regulatory standards.
- A pre-retirement handbook of frequently asked questions was developed and is distributed to individuals seeking information about retirement and participating in pre-retirement seminars.
- *Campus Notice* is increasingly used to notify faculty and staff of key deadlines, payroll, and other campus-wide information and events. Email reminders are also automatically sent to departments for transactions such as probation reports and term appointments.
- Annual individual total compensation reports were revised and updated and now show both the University's and the employee's contribution share of group pension and benefit costs.

The total average annual number of staff and faculty employed at UPEI has grown significantly within the last decade (Appendix D).

2.6 IT Systems & Services

2.6.1 Responsibility

MISSION

To provide information technology services and assistance to members of the campus community and to maximize the benefits this technology can bring to our clients.

The areas of responsibility are as follows:



Operations Group: responsible for desktop support, hardware maintenance and repair, server operation and maintenance, and operation of the campus data network.

Information Systems Group: responsible for the design, development, deployment, and operation of the information systems that support the business activities of the University, including financial and student information systems, as well as the systems that support the AVC.

2.6.2 Goals and Priorities

The 2009-2012 goals and priorities identified for IT Systems & Services (ITSS) are summarized below.⁷

Goal #1: Predictability in Response to Client Requests

- Design and distribute standardized desktop configurations.
- Develop and implement an “evergreening” program for hardware renewal.
- Develop and implement new trouble ticket procedures.
- Establish a campus IT governance and standards framework.

Goal #2: Substantially Improve Communication with, and between, Clients

- Develop, utilize, and promote a project management framework.
- Develop new contact methods.
- Develop and implement an interactive web site for communication with our clients.
- Re-design our public-facing web site into a more effective communication channel.
- Develop clear and accurate user-focused documentation and documentation standards for locally developed systems.
- Develop a closer relationship with other departments heavily involved in IT.

Goal #3: Deliver Exemplary IT Services

- Adopt ITIL (Information Technology Infrastructure Library) practices.
- Utilize virtualization to consolidate servers and increase resiliency.
- Identify and eliminate “single points of failure”.

⁷ www.upei.ca/itss/

- *Deliver services using the web and other open technologies.*
- *Design and implement centralized storage facilities.*
- *Develop and distribute guidelines and procedures for information integrity and security.*

Goal #4: Invest in Staff

- *Develop and carry out group- and individual-based training plans.*
- *Keep up-to-date with trends in technology.*
- *Increase one-on-one time between our staff and campus clients.*
- *Identify relevant industry groups and support staff involvement.*

Goal #5: Seek out New Opportunities for Acquiring Needed Resources

- *Establish connections needed to identify funding opportunities.*
- *Take a more entrepreneurial approach to service delivery.*
- *Make better use of available student resources.*

Goal #6: Increase Level of IT Proficiency Across Campus

- *Foster a campus work environment that encourages learning about job-related IT.*
- *Participate in the development of IT proficiency standards for the campus.*
- *Devote staff time to the preparation and delivery of IT training.*

2.6.3 2009-2010 Accomplishments

The most significant accomplishments for ITSS during the past year are identified below.

Strategic Leadership

- Computer Services underwent a name change to IT Systems & Services (ITSS) which better reflects the mandate and function of the Unit, referring to both the systems and the services that the Department is responsible for maintaining and delivering.
- Active engagement in the risk management initiative of the Office of VP Finance & Facilities complements ITSS's objective to identify and eliminate single points of failure involved in the delivery of its services.
- The Knowledge Exchange Network was initiated in response to the Provincial Government's *Rural Action Plan*, through leadership of ITSS, and is aimed at expanding UPEI's capacity to deliver on-line learning. As part of the project, the Atlantic Canada Opportunities Agency (ACOA) contributed \$500,000 for the purchase of technology including SmartBoards, computers, laptops, and software.
- Management completed a three-day course in Business Analysis Essentials that covered techniques for determining and documenting system requirements and other aspects of business analysis.
- Management completed a three-day course in Information Technology Infrastructure Library (ITIL) Foundations, which covered recent and relevant aspects of ITIL adoption. ITIL provides practical guidelines that support ITSS in defining and improving services offered to clients.
- Memberships in the Institute for Electrical and Electronics Engineers (IEEE) Computer Society were provided to managers and programmers and include access to a vast digital library and collection of on-line courses.
- Server administrators received Novell Certified Administrator certification facilitated through ITSS.
- E-learning planning document was developed aimed at describing a framework for increasing the effective utilization of technology for on-line learning through UPEI's E-Learning Committee.

Infrastructure

- A new uninterruptible power supply (UPS) was installed in the data centre at Don and Marion McDougall Hall, completing the requirements of the centre to host critical campus IT assets.
- A new air conditioning system and uninterruptible power supply were installed in the main campus data centre located at the AVC, replacing systems that were 25 years old.
- Wireless coverage was expanded to cover UPEI residences and Wanda Wyatt Dining Hall.
- Network cabling in Main Building was upgraded to increase data carrying capacity by a factor of 100.
- Assistance was provided with set up of new Language Lab in the Robertson Library, including a new server to replace the ageing server on which UPEI's learning management system, Moodle, runs.
- The faster Internet connection from Eastlink, which was negotiated through the NB/PEI Educational Computer Network, was installed, increasing UPEI's bandwidth at no additional cost.
- In conjunction with Facilities Management and a project to upgrade fire alarm panel communications across the campus, new fibre optic cables were installed in ring configurations between campus buildings, which will form the foundation of a new, faster, more robust campus network that will reduce UPEI's dependency on the campus fibre optic network installed in 1990.

IT Operations

- New tools and methods of deploying software on student lab computers have been adopted to reduce the time and effort required to install new applications and alter existing configurations.
- A new method of prioritizing requests for service (tickets) was developed and implemented within ITSS ticket management system to help improve customer service. Client feedback will be received through a brief client survey to be automatically sent at the time a ticket is marked complete in the system, which is currently under development.
- One quarter of the requests for service was completed within one day (Figure 6). Almost half of the services were provided within a week from the time of the request.
- In collaboration with Human Resources, a new process for the review of competition-related documents (e.g. resumes and covering letters) was developed and implemented.
- Wireless and other IT services were provisioned in support of 2009 Canada Summer Games held on campus.
- GroupWise Administrative PostOffice and Academic PostOffice had the most down-time of 77 and 54 hours, respectively (Figure 7).

Figure 6: Time to Resolve

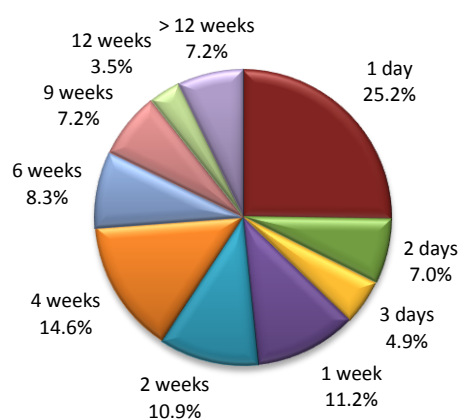
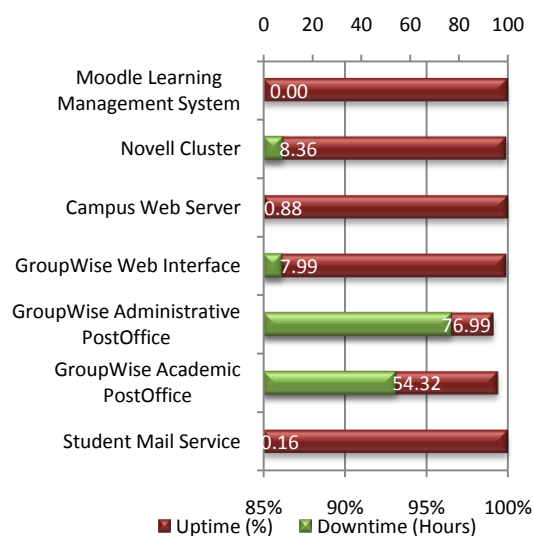


Figure 7: Critical Service Availability Hours of Downtime



ITSS is focused on improving client service by fostering a culture based on best practices and guidelines for use of information technology infrastructure.

Information Systems

- Two permanent full-time programmer positions were filled, providing much needed additional capacity in developing local systems.
- Working with the Electronic Document Management (EDM) Committee tasked with determining the optimal document management solution for UPEI, and then with the project team to develop a Fedora-based solution, interfaces have been developed which will permit access to information stored in the University Information System (UIS) to enhance its functionality.
- A committee, with representation from ITSS, was tasked with clarifying and streamlining the processes associated with the management of scholarships and awards as well as developing new UIS features to simplify the extraction of related data.
- Regular bi-weekly meetings with UPEI HR staff resulted in a number of improvements in the features of the UIS that support the HR Department.
- A plan for development of a new web-based electronic medical records system in support of the AVC's Veterinary Teaching Hospital was completed and accepted and development is well underway on the new system with completion scheduled for 2011.
- The license for Aestiva Timesheets was expanded to allow for electronic entry of timesheets by staff.



Essential support provided to UPEI students.



Photo by UPEI Photography

2.7 Sustainability & Energy Management

2.7.1 Responsibility

MISSION

To foster a culture of sustainability and improve energy efficiency in all aspects of university life including services, infrastructure, operations, academics, and research.

The areas of responsibility are as follows:



UPEI is committed to developing an environmentally responsible campus that is economically viable and reflects the values of the community. The sustainability of resources and energy savings are university priorities and responsibilities falling under the Vice-President of Finance & Facilities and Manager of Sustainability & Energy Management in collaboration with the Director of Environmental Studies and other UPEI stakeholders.

2.7.2 Goals and Priorities

The Vice-President and Manager of Sustainability & Energy Management will work with internal and external stakeholders to achieve the following 2009-2012 goals and priorities:⁸

Goal #1: The Office

- Develop a communications plan with Integrated Communications to inform campus and external stakeholders of our progress.
- Develop a web site that includes a listing of projects and initiatives on campus by fall 2009 and continue to update the web site with relevant and timely information.
- Develop a risk management strategy to mitigate issues on campus.
- Develop a change management strategy for implementing successful programs.
- Develop partnerships and good working relationships with government, industry, and research organizations to further on-campus initiatives and seek out funding partners.

Goal #2: Sustainability

- Establish the Sustainability Advisory Committee by the summer of 2009. (Completed in 2009.)
- Support establishment of a network of university and college sustainability professionals in Atlantic Canada for working under a common framework and sharing best practices that involves the new Canadian University Sustainability Professionals by spring of 2010. (Completed in 2009.)
- Establish and adopt a system to measure and monitor campus environmental footprint.
- Develop a system to track projects by type (e.g. waste) and functional area on campus.
- Identify and implement 40 sustainability initiatives between September 2007 and 2010.

⁸ www.sustainability.upei.ca

Vice-President Finance & Facilities Annual Operations Report 2009-2010

- *Engage campus groups (students, faculty, and staff) and external partners in sustainability initiatives on campus coordinated through Sustainability Advisory Committee.*
- *Implement a tracking process for paper consumption by department by fall 2009 in keeping with UPEI's goal to reduce paper consumption by 20% by 2010 and 30% by 2012.*
- *Develop a benchmark and incorporate into a transportation management strategy.*
- *Develop or contribute to strategies for key areas of focus including energy utilization, waste management and sustainable procurement by the fall of 2009, water conservation by spring of 2010, and alternative transportation options by fall of 2010.*

Goal #3: Energy Management

- *Complete development of a campus energy data acquisition system that will allow for timely and consistent reporting of campus energy usage, including real-time updates.*
- *Develop a comprehensive energy management reporting system that provides regular updates and measures progress against benchmarks.*
- *Develop an energy database, in collaboration with Facilities Management and IT Systems & Services, that includes heat, electricity, and water data and to design the database to be expandable and accessible by users that need access to accurate and consistent energy data.*
- *Establish targets and benchmarks on a campus and building basis consistent with industry best practices using the database. Report on benchmarks on a quarterly basis.*
- *Develop a process to produce an annual energy forecast, updated quarterly, that informs the university and departmental budget processes.*
- *Develop an alternative energy evaluation process to assess potential opportunities.*
- *Develop building energy management guidelines that outline requirements for new buildings and for renovations on campus.*

2.7.3 2009-2010 Accomplishments

The most significant accomplishments of the Office of Sustainability in 2009-2010 are identified below.

Strategic Leadership

- UPEI was nominated and awarded one of the three finalists of the Greater Charlottetown Area Chamber of Commerce President's Excellence Environmental Award.

Sustainability Advisory Committee

- The Committee was mandated by the Sustainability Policy adopted in March 2009, and includes representation from academics, staff, and graduate and undergraduate students, as well as external members representing Holland College, the City of Charlottetown, and alumni. The Committee met seven times to review proposals for energy guidelines, promotion of Moodle amongst faculty to reduce paper consumption, environmental standards (e.g., BOMA BEST), among others. The Committee has developed various initiatives that will be presented to Senior Management Group for review and approval and will become the responsibility of the Office of Sustainability such as energy, printing, and waste management guidelines.

Sustainability

- The Atlantic Universities and Colleges Sustainability Network (AUCSN) was formalized as a committee of ISI. UPEI Manager of Sustainability was elected as first chair and meetings were held bi-annually.
- AUCSN's meeting at UPEI in October 2009 included presentations by Natural Resources Canada, Canadian Green Building Council, Direct Energy, and Envirozone. The event included a Forum on Sustainability with presentations by UPEI, Holland College, and other regional universities.
- The Forum on Sustainability was part of the first Sustainability Week held at UPEI which included other events to raise awareness of sustainability initiatives at UPEI. Sustainability presentations were made during this fall event as well as in the winter of 2010 to students studying global issues.
- The Manager attended a course in Halifax to learn about the Natural Step system and how this system can support the implementation of sustainability at UPEI.
- The Manager participated in the preparation of the City of Charlottetown's Integrated Community Sustainability Plan, which was initiated in the fall of 2009 and was presented to City Council.
- A new procurement policy was adopted in the spring which included a section on sustainable procurement.
- A new solar powered club car was tested on campus during the winter and is intended to replace existing standard club cars at UPEI.
- The BOMA BESt standard⁹ was selected as the model for an environmental evaluation of the buildings on campus, which is planned for completion in the fall of 2010.
- Input was provided on the design of the new building for the School of Nursing, Family, and Nutritional Sciences which includes energy efficient and sustainability initiatives.

Energy Management

- Annual meetings with energy providers, Maritime Electric Limited and PEI Energy Systems, continue to foster strong working relationships, manage issues, and improve services provided to UPEI.
- The second annual Residence Energy Challenge encouraged residence occupants to reduce energy usage. The program was expanded to include seven campuses of six institutions with 37 residences and more than 6,000 students involved from throughout the region.
- The Energy Task Force made recommendations for an energy audit and guidelines. Energy guidelines were developed, submitted to Senior Management Group for approval, and adopted in the fall.
- A comprehensive energy audit of campus was completed during the fall and winter, which was the first audit on campus since 2000. Direct Energy Business Services completed the audit and recommended improvements for energy efficiency and resource management.
- A feasibility analysis was completed on the potential installation of a wind turbine on campus and presented to Senior Management Group.
- A review was initiated on the possibility of a vertical axis wind turbine on campus for which a decision would need to be made prior to construction of the new School of Nursing, Family, and Nutritional Sciences building planned for the summer of 2010.
- An evaluation of potential wind generation on off-campus land holdings concluded that wind resource was sufficient; however, without a transmission interconnection, any project would not be feasible.

⁹ www.bomabest.com

- Implementation of the systems required to connect UPEI's heat energy metering network into the existing electricity meter database have been initiated. This tracking will provide near real-time feedback of heat energy usage for each building on campus.
 - An energy tracking procedure was implemented in collaboration with IT Systems & Services to determine energy requirements of the campus server rooms.
 - An expansion of the metering network for electricity consumption was undertaken to determine losses in energy transformation on campus and is expected to be completed by December 2010. LED test lighting was installed as outdoor lighting across campus and at the AVC in order to evaluate its effectiveness for more wide-spread use at UPEI.
 - A review of AVC energy usage was conducted and submitted to AVC and Senior Management Group to assist in forecasting usage into the next fiscal year.
-

Over 454 fewer kgs of waste went to landfill from students leaving campus who dropped off unwanted items for resale/ donation during 2nd Dump & Run Event.

Resource Preservation

- Support was provided during the Request for Proposal (RFP) from Interuniversity Services Inc. (ISI) for supply of new multi-function devices for campus. The review and selection process, which was coordinated through ISI, was an initiative of the UPEI Paper, Printing, and Photocopying Task Force.
- The Environmental Society held its second annual "Dump and Run" Event on campus in the spring, which allows students leaving campus to drop off unwanted items for resale or donation. The Office supported students with event planning and coordination. More than 450 kilograms of waste was diverted from landfill.
- Waste management guidelines were developed and submitted to the Vice-President of Finance & Facilities for review and will be presented to the Senior Management Group in the fall of 2010.
- Participation in the Paper, Printing, and Photocopying Task Force, contributing to the research of ideas for reduction of paper usage on campus continues.
- A tour was conducted of the University's offsite land holdings to ensure properties are managed in an environmentally friendly manner.
- A "green brief" that outlined green choices for UPEI departments during the campus non-space budget call was developed.

Communications

- The sustainability web site was redesigned and updates on projects and initiatives continue.
- The Manager continued as a member of the Engineers' PEI Environment Committee, which raises awareness of environmental practices and promotes sustainable design practices.
- The Climate Change Forum held on campus in April included discussions on mitigation and adaption strategies for PEI and the possibility of establishing a climate change research center in the province.

3.0 The Year Ahead

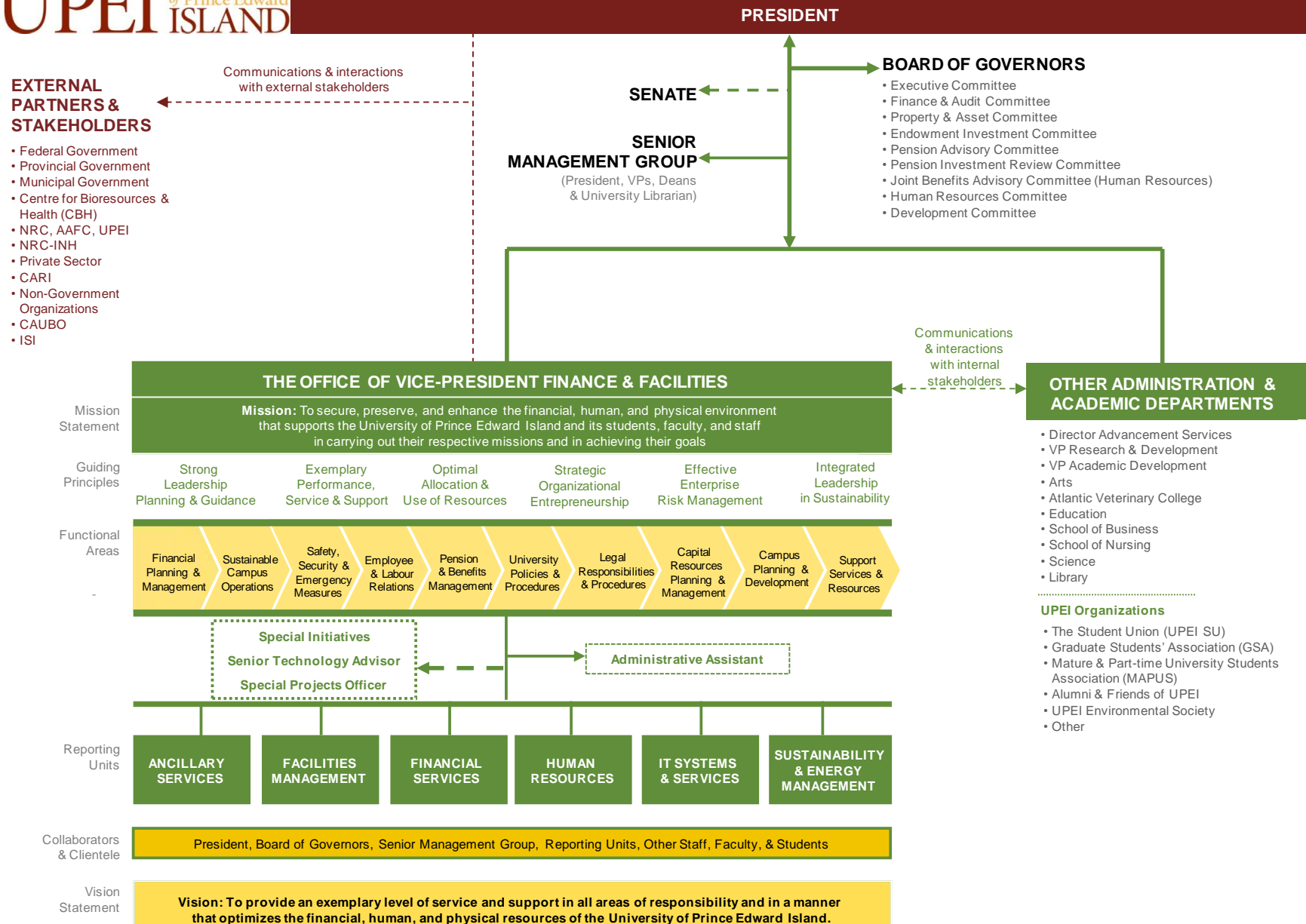
The Office of VP Finance & Facilities is committed to supporting the University in achieving its mission of people, excellence, impact. Priorities for 2010-2011 are as follows:

- The Department of Athletics, Physical Education, & Recreation will begin reporting to the Vice-President of Finance & Facilities and will prepare a three-year strategic plan by the fall of 2010.
- The VP and Directors will update their strategic goals in the fall of 2010 to reflect accomplishments to-date and to further identify priorities for the year ahead. Metrics for measuring progress will be more clearly defined, where possible.
- The Office of VP Finance & Facilities and each reporting unit will continue to finalize and execute communications plans and incorporate feedback received from internal and external stakeholders.
- Success Planning and Review Process will be further developed and will continue to be rolled out within Finance & Facilities and elsewhere throughout the University. Professional development and leadership activities will continue to be a priority.
- The Enterprise Risk Management Unit will coordinate the development of a risk management profile for UPEI, working with campus stakeholders to identify risks and to develop strategies and best practices to manage risk.
- An Information Master Plan will be developed for the University through the Committee tasked with this responsibility with representation from various stakeholders across campus and leadership provided by IT Systems & Services and the Vice-President of Finance & Facilities.
- Newly acquired properties adjacent to the University will be integrated into the UPEI portfolio.
- Ancillary Services will continue its efforts to increase revenue from residence, food, and conference operations in support of annual targets and business plan.
- The new food services contract will be finalized and enhancements and capital improvements to food services outlets on campus will take place.
- Construction of the new School of Nursing, Family, and Nutritional Sciences building is estimated to be completed by early fall of 2010.
- Facilities Management will finalize the compiling of data for UPEI buildings into the facility condition assessment software by December and will use this valuable resource for capital planning purposes.
- The 2011-2012 annual operations budget incorporating strategies identified through the Budget Development Task Force initiative as well as projections for fiscal year 2012-2013 will be presented to the Board of Governors for approval.
- Development of the new capital budget in conjunction with the request for funding assistance with the Province of PEI will take place.
- Pension administration will continue to be coordinated and a long-term pension strategy developed.
- Collective agreements will be successfully negotiated and implemented.
- The review of the University Information System (UIS) will be completed and the strategic direction initiated.
- The fostering of working relationships with internal and external stakeholders to support and promote sustainability efforts on campus will continue in 2010-2011.
- Key recommendations of the Energy Audit will be implemented.
- The BOMA BEST environmental evaluation on campus will be completed by the end of the fiscal year.

Appendix A: An Overview of Finance & Facilities

The Office of Vice-President of Finance & Facilities is responsible for securing, preserving, and enhancing the financial, human, and physical environment that supports the University of Prince Edward Island and its students, faculty, and staff in carrying out their respective missions and in achieving their goals. The Vice-President of Finance & Facilities carries out its roles and responsibilities by working closely with staff, reporting units, Senior Management, and other UPEI stakeholders. An overview of the VP Office's strategic direction (mission, vision, and guiding principles), functional and organizational responsibilities (functional areas and reporting units), as well as interactions and communications with internal and external stakeholders is presented on the following page.

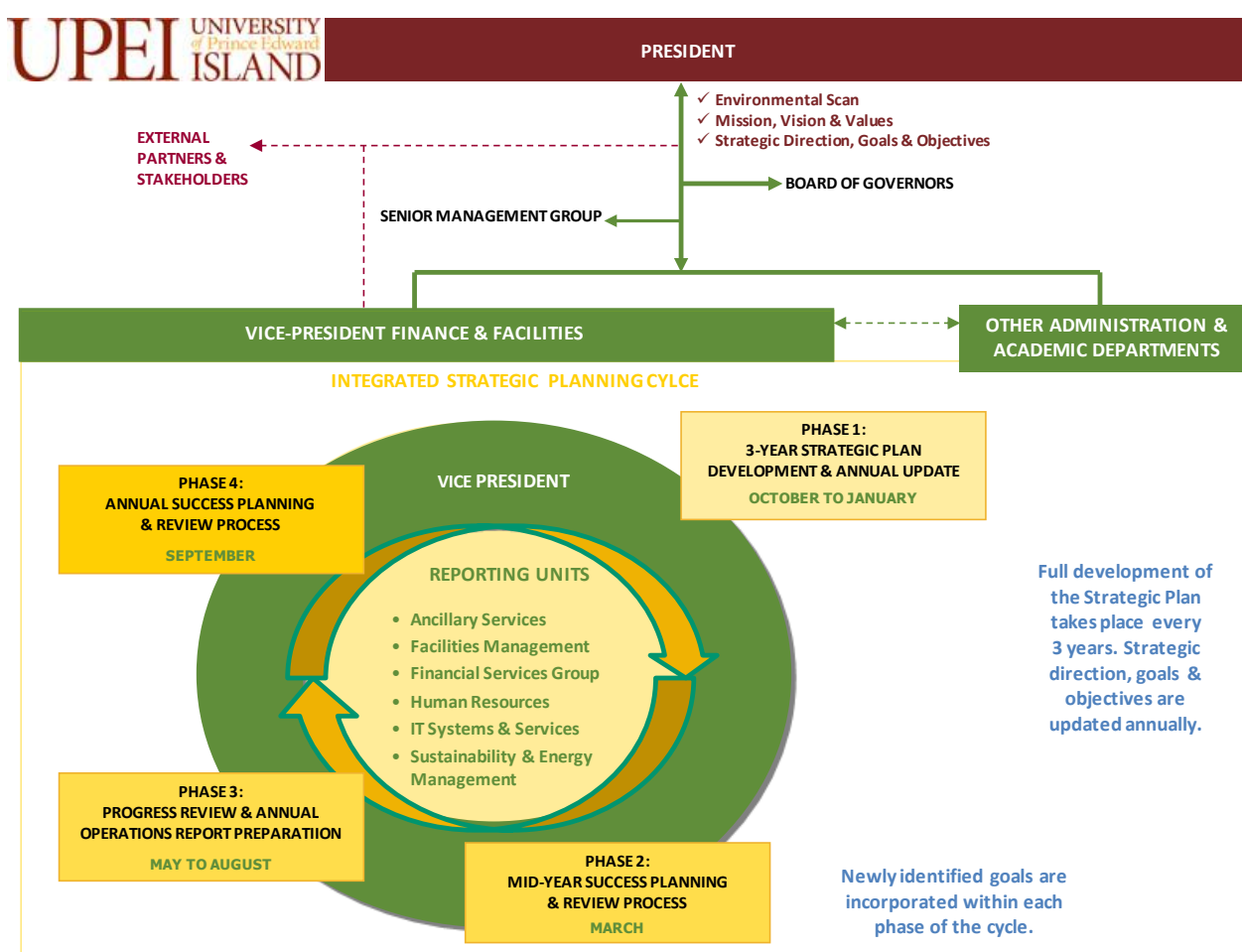
The Office of Vice-President Finance & Facilities' Strategic, Functional, and Organizational Chart



Appendix B: Strategic Planning Framework

The 2009-2010 fiscal year resulted in the first complete cycle of the strategic planning process, which was initiated in the fall of 2008 by the Vice-President and Directors. The four-phased process, as outlined in Figure B.1, is client-focused and evolves with changes to the university environment.

Figure B.1: Four-Phased Annual Strategic Planning and Review Framework



The Vice-President of Finance & Facilities continues to work towards the goals and priorities identified during the 2008-2009 fiscal year and revisited throughout the most recent fiscal year. Directors and Managers of each reporting unit have identified plans that are reflective of their responsibilities and the Vice-President's priorities. Priorities will be revisited in the fall of 2010 in order to reflect the most recent circumstances facing the University and the individual departments.

The Management Team is accountable for the achievement of desired outcomes through the Success Planning and Review Process first implemented in the winter of 2009, with a mid-year review in March (Phase 2) and an annual planning and review process in August (Phase 4) of each year. The Annual Operations Report (Phase 3) highlights progress made on priorities during the most recent fiscal year and the outcomes support the evaluation for success planning and review.

Appendix C: 2009-2010 Financial Overview

The financial overview for the 2009-2010 fiscal year includes a summary of UPEI's operating revenue and expenses. Detailed audited financial statements are available at www.upei.ca/home/publications.

(1) UPEI Operating Revenues

Total Operating Revenue

The University of Prince Edward Island's total operating revenue was \$100.7 million in 2009-2010, increasing by almost 7% from \$94.3 million during the previous year (Figure C.1). UPEI's operating revenue grew by slightly more than 32% in the last five years.

Operating grants accounted for 55% of UPEI's operating revenue and increased by almost 6% (compared to 14% in 2008-2009) to \$55 million in 2009-2010 (Figure C.2). One fourth of the operating revenue came from student fees, which accounted for almost \$25.7 million in revenue with an annual growth of 11% (compared to 9% in 2008-2009), from the previous year. Sales and services revenue grew from almost \$14.3 million in 2008-2009 to \$15.3 million in 2009-2010.

Research Grants

External grants and contracts experienced a 9% annual increase (from \$15.8 million to \$17.2 million in the most recent year). The research program at UPEI has grown by almost 330% in the last decade (Figure C.3).

Figure C.1: UPEI Operating Revenue
Five-Year Summary
(As at Fiscal Year End)

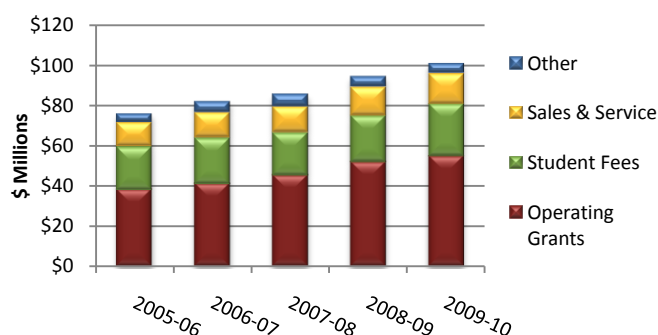


Figure C.2: 2009-2010 UPEI Operating Revenue
Percentage Breakdown

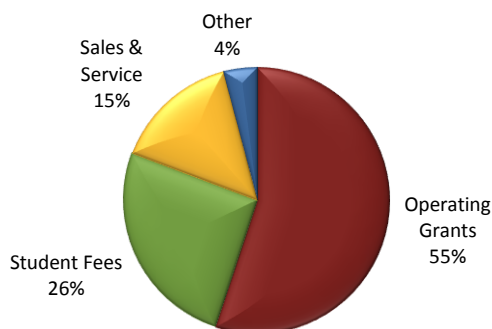
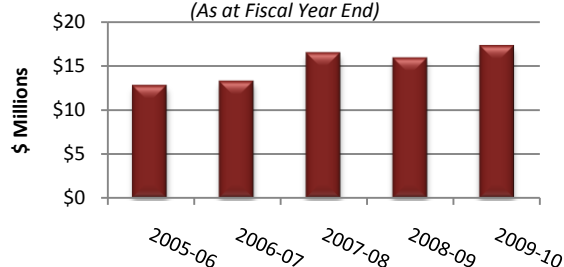


Figure C.3: Research at UPEI
External Grants and Contracts
(As at Fiscal Year End)



UPEI has experienced tremendous growth in research grants within the last decade and has had consistent annual growth for other revenue sources.

Endowments

UPEI’s Endowment Fund is made up of gifts that honour the name and life of a donor, friend, or family member. The fund had a market value of \$18.4 million as of the end of the 2009-2010 fiscal year compared to \$16.5 million at the end of the previous year (Figure C.4). The endowment fund is picking up momentum after experiencing a decline in 2008-2009 due to the general downturn in equity market returns. Endowments are carefully managed for annual growth by an independent investment firm that reports directly to the Endowment Investment Committee chaired by the Comptroller. The fund has increased by slightly more than 8% since the 2005-2006 fiscal year. Endowments contribute to the long-term stability and growth of UPEI.

Ancillary Services Gross Revenue

Ancillary Services gross revenue includes sales from Food Services, Residence Services, Conference Services, and the Bookstore. Total gross revenue grew to slightly more than \$8.2 million in fiscal year 2009-2010 from \$7.6 million during the previous year (Figure C.5).

Conference Services experienced a record financial year, with annual gross revenue of slightly more than \$1.1 million, almost a 41% growth from the previous year.

Gross revenue from the Bookstore accounted for the largest percentage (32.5%) of total gross revenue and increased by almost 11% from the previous year. Gross revenue from Residence Services experienced a small growth.

Food Services revenue, which includes vending machines, was relatively stable over the last two years with only a 1% growth during the fiscal year 2009-2010 (Figure C.6). Revenue from summer meals plans increased while revenue from conference catering declined.

Figure C.4: UPEI Endowments
(As at Fiscal Year End)

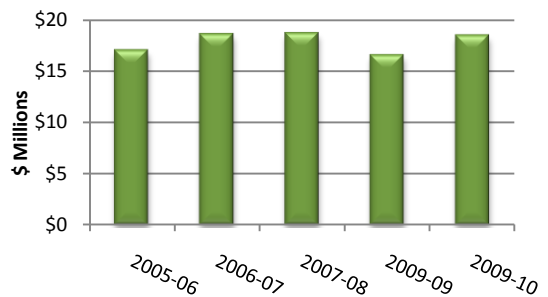


Figure C.5: Annual Comparison of Ancillary Services Gross Revenue
(As at Fiscal Year End)

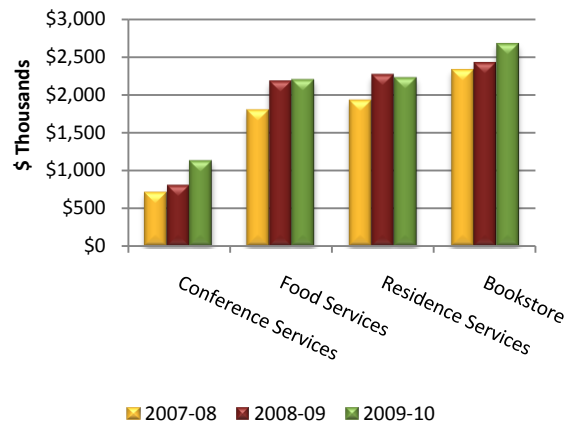
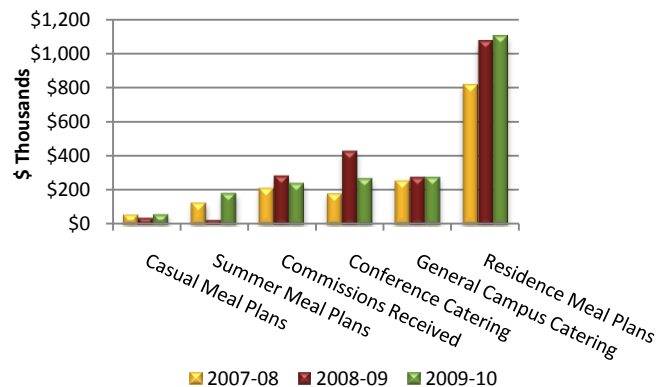
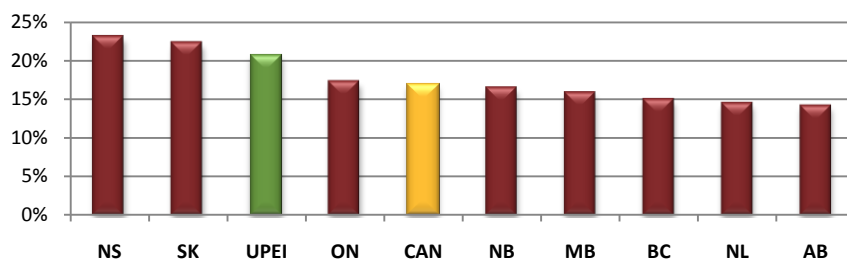


Figure C.6: Food Services Revenue
(As at Fiscal Year End)



The proportion of overall revenues from sales and services at UPEI ranks among the highest for universities across Canada (Figure C.7).

Figure C.7: Ancillary & Other Revenues as a Percentage of Total Revenues University Revenues (CAUBO 2007-2008)



*Information on universities in Quebec was not available

(2) UPEI Operating Expenditures

UPEI's operating expenditures were slightly more than \$99.6 million during the fiscal year 2009-2010, which is almost a 6% increase from the previous year. Operating revenue experienced greater growth (7%) during the same time period, resulting in greater profitability. Operating expenditures have grown by slightly more than 37% while operating revenues have grown by almost 32% over the last five years.

The largest operating expenditure continues to be salaries and benefits, representing 69% (compared to 66% in 2008-2009) of total operating expenditures during the 2009-2010 fiscal year (Figure C.8). Supplies (15%), utilities (5%), scholarships (4%), and other (7%) make up the remainder of the operating expenditures.

UPEI's expenditures as a percentage of total operating expenditures for the fiscal year 2008-2009 were compared to the national average of universities from across Canada, based on 'expenditure by function' data provided by CAUBO. As shown in the Table C.1, UPEI spent a greater percentage of total operating expenditures on instruction during the most recent fiscal year when compared to other universities from across Canada. At the same time, the percentage of administration and general expense was lower.

Figure C.8: 2009-2010 University Operating Expenditures Percentage Breakdown

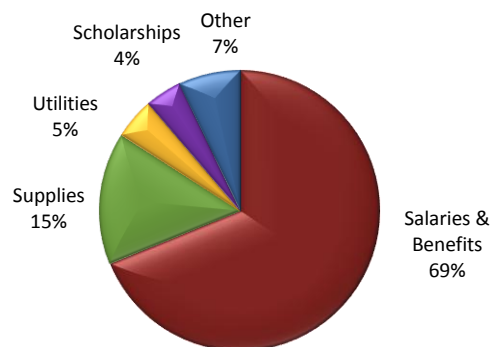


Table C.1: Comparison of National and UPEI 2008-2009 Operating Expenditures (as a percentage)

	National	UPEI
Instruction	58%	62%
Library	5%	4%
Computing	4%	3%
Administration & general	10%	9%
External relations	2%	1%
Physical plant	8%	7%
Utilities	3%	5%
Scholarships	5%	5%
Student services	5%	4%

(3) Energy Efficiencies and Cost Savings

UPEI has been achieving greater energy efficiency, resulting in reduced overall costs, within the last decade at a time when consumption has increased due to campus expansion. Energy intensity continues to decrease due to improved efficiency in older buildings and construction of energy efficient new buildings and is considered to be low compared to similar operations.

Figure C.9 presents the year-over-year energy efficiencies associated with electricity costs since 2004-2005. Electricity intensity has been decreasing even as the cost of energy has continued to escalate over the longer term. The sole exception is 2006-2007 energy increase as a result of the construction of the NRC building and renovations to Duffy Science Centre. The University is focused on continued improvements and efficiencies to further reduce these costs.

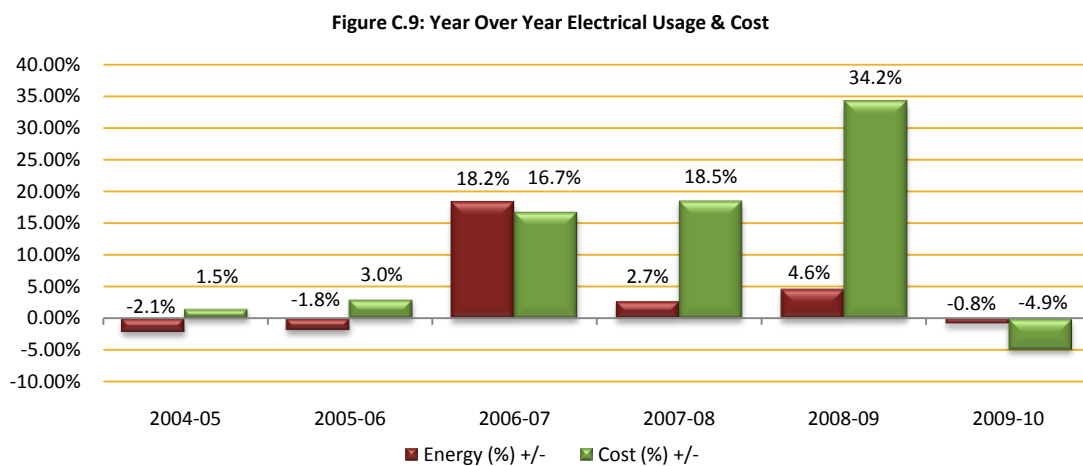
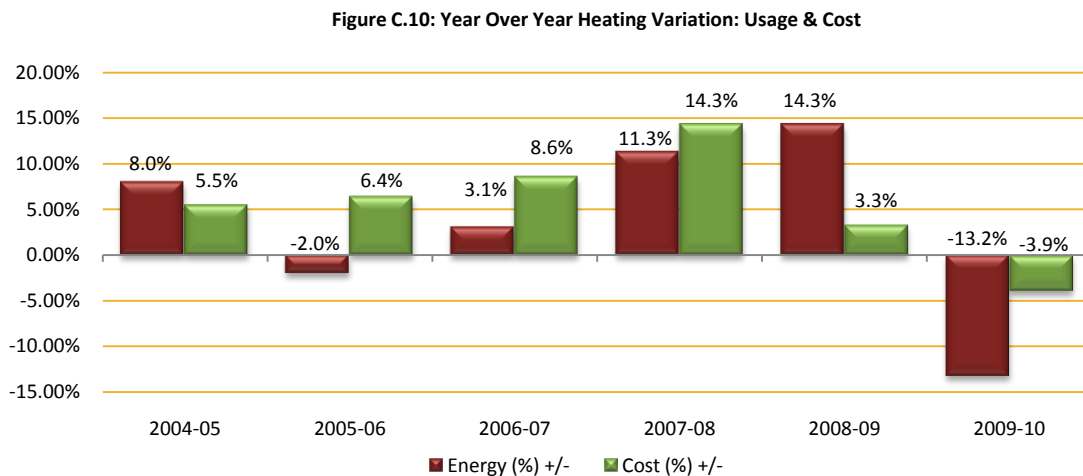


Figure C.10 shows the year-over-year percentage change in usage and cost of heat since the 2004-2005 fiscal year. The University's long-term contract with PEI Energy Systems continues to provide value for the University with an average cost of about \$0.065/kWh of heat provided. Since 2003-2004, UPEI has saved more than \$10 million by not using electricity as the heating source.



Appendix D: Campus Growth

The University of Prince Edward Island has achieved significant growth in the last decade. This growth impacts the level of services provided on campus. The growth in facilities, human resources, and network devices is provided below.

(1) Facilities

The footprint of the UPEI campus increased by 30% over the last decade (Figure D.1). There was a slight decline in the number of square feet from 2008 to 2010 because of the closure of the Classroom Centre. The replacement value of buildings on campus has increased by 28% during the same period (Figure D.2).

Figure D.1: UPEI Building Square Footage

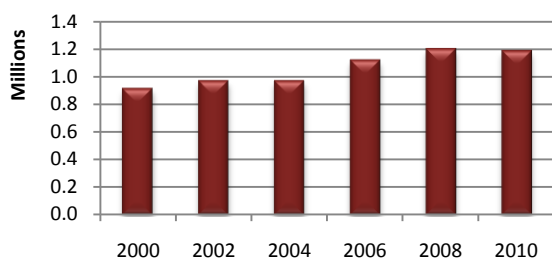
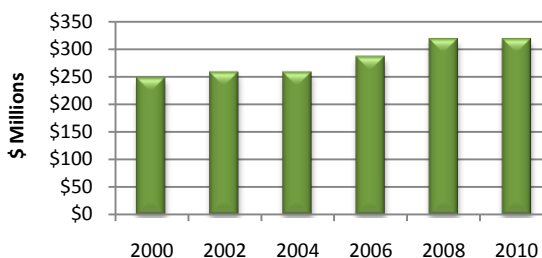


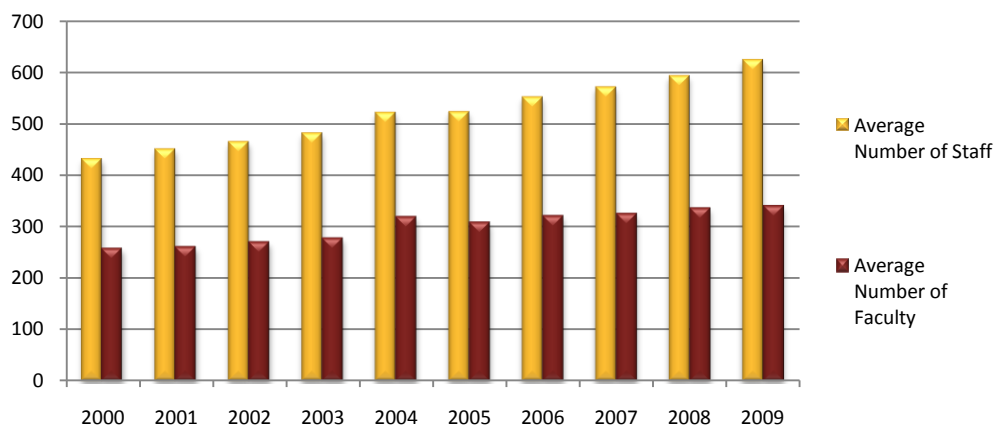
Figure D.2: UPEI Building Replacement Value



(2) Human Resources

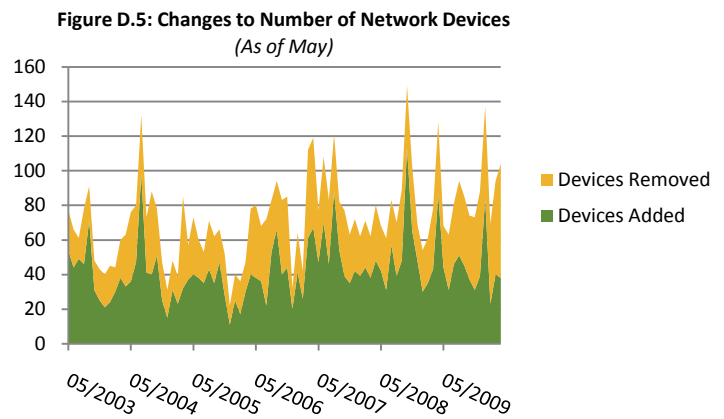
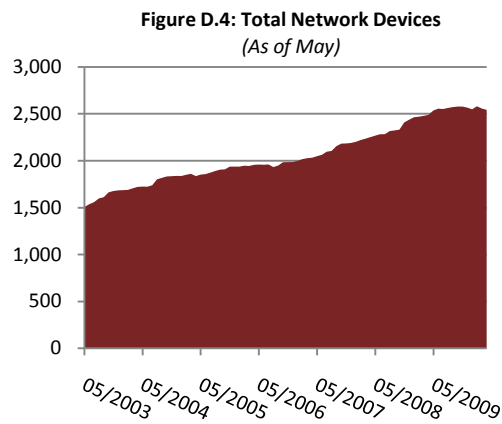
The total average number of faculty and staff employed at UPEI has grown significantly within the last decade, and fluctuates during any given year. The average number of faculty and staff employed at UPEI for each year since 2000 is presented in Figure D.3. This figure includes all term and part-time appointments and is simply based on an average headcount of the number of staff and faculty employed at the University.

Figure D.3: Average Annual Number of Employees: Staff, Faculty, and Students



(3) Computer Networks

The number of network devices located across campus has been growing along with the University. Figure D.4 presents the total number of active devices (e.g., PCs, networked printers, and network switches) on the core of the campus network (which does not include the wireless network and network users in residences). Figure D.5 presents the number of devices removed and added to the network by month since May 2003.



The growth of the University of Prince Edward Island over the last decade has greatly impacted the demands placed on the level of services provided on campus. Facilities & Finance service providers are working hard to do more with the resources they have available to them and to improve service delivery.

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