



McGill Managers Matters

A “Q & A” with the Provost

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Provost
McGill University

Presentation to Management Staff

20 November 2012





AGENDA

1. Introduction: Fran Ezzy-Jorgensen
2. Q and A with the Provost
3. Achieving Strategic Academic Priorities Presentation
4. Key Considerations: Budget Planning FY2014 and Beyond
5. Feedback
6. Lunch



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“You’ve got to be very careful if you don’t know where you are going because you might not get there.” Yogi Berra



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M Staff at McGill : Key Members of Community

- **M-staff proposed salary policy for 1 June 2013**
 - 3.5%: 2% merit and 1.5% economic increase
 - contingent on several factors, including today's Quebec budget announcement
- **Achieving Strategic Academic Priorities**
 - developed recommendations within Career Development workgroup
 - participated in other ASAP workgroups
 - provided feedback on ASAP iterations
- **Best Business Practices**
 - contributing partners in the process to streamline, automate and implement business processes as part of the Workforce Planning Initiative

Your Concerns and Suggestions are Important: “Recruitment to Retirement” Project (R2R)

- suggestion at “Managers Matters” March 2011 from Connie Di Giuseppe:
 - automate process and procedures for new academic hires
- project submitted by APO in September of 2011, along with HR initiatives
 - R2R for academics
 - administrative staff recruitment
 - talent management
 - employment termination practices
- April 2012: approved, in implementation



Questions: Management Forum Issues



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Question 1

- What is the relationship between strategic planning and the workforce planning initiative?

Question 2

- McGill's professors have largely been trained to a 20th century world, so how can we ensure that they meet the expectations of the 'born digital' generations who are already enrolled as undergraduates here?

MILE: McGill Innovative Learning Environments

Transforming teaching and learning on-campus at McGill:

- **Teaching Innovations Complex**
 - hands-on laboratories, interdisciplinary focus
- **Reimagining the Library**
 - replace many physical volumes with digital resources
 - renovation of physical spaces
- **Technology upgrades**
 - access to state-of-the-art technology
- **Innovative partnerships: *edX***
 - partner with MIT-Harvard-UC Berkeley-University of Texas
 - MOOCs

Question 3

- Consultation [with administrators who work at the level of the "shop floor"] is a valuable step when the University is envisaging changes to procedures. Can we look forward to such consultation in the future?

Question 4: For AVP Human Resources to address

- How can we improve the quality of the Leadership on all levels at McGill? How are current leaders developing/improving their leadership skills?
 - Career Development Workgroup recommendations are part of ASAP document
- In the last 3 years, my unit has lost a significant amount of management employees under the age of 35, who are taking our IP and know how to our competitor institutions (Carleton, U of T, Western, York etc.), making them more competitive. What real investments are being made to retain and developing the middle management at the university and creating parity among titles, levels and positions with our competitors in the rest of Canada?

Question 5: For VP-RIR to address

- McGill seems missing in action when it comes to the world of 21st century research data management, archiving, etc. Who is looking after this important part of the future of knowledge here?
- How do reductions in operating budgets affect our research community?

Question 6: What can I do to contribute?

- get involved
- volunteer to become part of work groups
- make suggestions to Management Forum and Managers Matter
- attend information sessions such as Faculty Councils, Town Halls and Outreach sessions
- send your suggestions on ASAP and the to the email addresses on the Provost's website



Achieving Strategic Academic Priorities



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Thank you! Your support for ASAP 2012 means a lot and is much appreciated

- Fellows of Senate
- Deans, Chairs and Directors
- Faculty and Library Councils
- Student Councils and Associations
- **Management Forum**
- Members of the various work groups
- Academic and administrative units
- Many, many others who
 - attended open forums and meetings
 - communicated online to provide thoughtful feedback

McGill's Mission

McGill is:

- research intensive
- student-centered university
- with a commitment to excellence
- when judged against the highest international standards
- and with an enduring sense of public purpose

ASAP 2012

Presentations to Management Forum

1. Outlined connection to 2006 white paper and considered way forward
2. Provided statement of purpose and guiding principles
3. Reviewed and confirmed major strategic objectives
4. Explained proposed Work Groups
5. Distributed an executive summary
6. Provided website form and email for feedback

Work Groups

- Academic renewal, hiring, retention, and leadership development
- **Supporting McGill's academic mission/Services for Students**
- **Career development for administrative and support staff across the University**
- Service to Quebec and Canada
- Service to Global Community
- **21st century Education for the Professions**

ASAP 2012 Consultation: Lessons Learned

- **Incredible in human resources: superlative faculty, exemplary students, talented staff**
- Truly international university
- Vast array of existing expertise in many areas to be addressed by ASAP 2012
- Accomplishments are not well communicated
- Interest in interdisciplinary approaches and collaboration:
- Transformative technological advances
- Strongly felt need that McGill must respond to the changes since 2006

By the numbers: 3 Strategic Priorities

1. Advancing McGill's academic success, profile and reputation for excellence, nationally and internationally.
2. Achieving a sustained student-centred focus that will enhance educational, research and extra-curricular life and learning for students at all levels.
3. Managing existing resources and diversifying and optimising revenue sources for maximum impact in support of educational programs, research activities, and community engagement.

By the numbers: 6 broad goals

1. enhance world leadership in research, scholarship and creative activity
2. revitalize educational programs to enrich the undergraduate and graduate student experience
3. reinvigorate connections across Faculties, schools, departments, institutes, and centres
4. extend community engagement in our areas of strength
5. refresh organizational structures and renew facilities and infrastructure to advance McGill's academic mission
6. renewing facilities while recognizing stewardship for historic buildings and heritage

By the numbers: 10 Major Strategic Objectives (1 of 2)

1. *Academic renewal plan* → **Achieve new directions in Faculty hiring, development, and retention**
2. *UG composition and experience* → **Emphasize innovative delivery of educational programs and appropriate levels of student aid**
3. *Improved Grad Studies experience* → **Ensure innovation in graduate studies based on research strengths and competitive funding**
4. *Disciplines and inter-disciplinarity* → **Develop and implement transformative research initiatives based on competitive advantage**
5. *Quality support services* → **Develop a culture of “best practices” in academic endeavours**

By the numbers: 10 Major Strategic Objectives (2 of 2)

6. *Professional development, productivity and satisfaction* → Enhance career development opportunities for administrative and support staff
7. *Performance management indicators* → Implement academic analytics, processes, tools, and feedback loops
8. Provide service to Quebec, Canada and the global community by means of activities and international collaborations with measurable impact
9. Encourage diversity in origin and ideas among students, faculty, and staff
10. Attain pre-eminence in education for the professions

Special note on research objectives

- The stated research objectives are designed to advance McGill's profile as one of the world's leading research-intensive universities
- Objective 4: Develop and implement transformative research and creative activity initiatives based on competitive advantages.
 - Currently indicated strategies and actions are derived from *Strengths and Aspirations* (2006), submissions from academic units, and recommendations of work groups
- McGill's Strategic Research Plan (SRP)
 - responsibility of VP-RIR
 - results from year-long and broad consultation
 - currently undergoing final revision
 - *when finalized, SRP strategies and action items will be added to ASAP 2012's "Objective 4"*

ASAP 2012: potential measures of success

- set academic **priorities**, goals, objectives, strategies for the next five years
- provide a **roadmap** that advances and sustains McGill's leadership among the world's great universities
- serve as the **driver** for the University's sustainable multi-year financial plan and budget allocations
- was endorsed by Senate on 17 October 2012
- be **endorsed** (and embraced) by McGill community

Some questions to consider

1. Can we suggest additional actions to advance McGill's profile, reputation, and performance as one of the world's leading research-intensive universities?
2. Do you know of any additional concrete and specific strategies or actions in education, research and extra-curricular life that will help to improve McGill's student-centredness?
3. In what ways can we take best advantage of the advances in information and communications technology that are transforming higher education, while staying faithful to McGill's mission?



Let's continue the conversations

**ASAP 2012: Achieving Strategic
Academic Priorities**

**www.mcgill.ca/provost/asap2012
whitepaper@mcgill.ca**

Strategic Research Plan (SRP)

**www.mcgill.ca/research/strategic
[-research-plan](#)
srp@mcgill.ca**

McGill's Budget: Key Considerations



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Questions by M's about McGill's budget

- Given the tuition freeze and the likely continuation of either zero or low increases in the future, what are you considering to balance budget in the coming years?
- What will be the immediate consequences of the tuition increase retraction by the current Quebec government?
- Has McGill already established a delegation to the upcoming government summit on University (under)funding?
- What is the university's progress on meeting and closing the gap on our deficit? How will the new curriculum affect research-intensive departments?

FY2014: Current Budget Process at McGill

- **Provostial model**
 - multi-year framework at University-level linked to academic priorities
 - fact-based and assumption-based models
 - decision trade-offs, KPIs, analytics
 - marginal funding for operating budget only
 - for Faculties investments in “Compacts” based on strategic priorities
 - for units reporting to VPs: first pass with Provost, decision by Principal
 - shared oversight responsibility for results
 - Financial Services
 - unit level administrative personnel

FY2014: Proposed Budget Process at McGill

- **Proposed modifications**

- multi-year multi-fund budget planning based on strategic academic priorities developed with Faculty and unit level
- GAAP reporting models: operating, capital, restricted, and endowment
- creation of an Budget Executive Committee: Principal, Provost, Vice-Principal (A&F)
- articulated integrated accountability framework
- Compact agreements extended to Vice-Principal units

- **Provost remains responsible for**

- integrating proposed agreements, recommending initial allocations
- presenting final budget framework, writing and publishing McGill Budget Book

FY 2014 and Beyond: Finance and Budget Integration Framework

- University-level academic priorities articulated in ASAP 2012
 - principles and outline endorsed by Senate (October 2012)
 - links to SRP, Master Plan, Principal's Task Forces, Campaign McGill, and other statements
 - objectives outlined within a multi-year strategy
 - strategies and actions:
 - some in companion document
 - expression at local level to follow
 - FY2014 is the first pass

Recasting Budget Documentation

- GFOA Distinguished Budget Presentation Award
 - based on 29 principles linking planning and budgeting
- Proposed modifications to increase transparency and accountability:
 - frame investments and allocations in the context of forecast availability of resources from all sources over the next 5 years (ASAP 2012, etc.)
 - identify internal redistribution requirements (ABB)
 - realize cost savings (SRI)
 - diversify revenue streams and alternative funding sources (SRI)
 - clarify assumptions, analyze variances, balance the budget

Current economic realities: Significant projected shortfall for FY2014

1. **Salary** adjustments
2. Requirement for additional contributions to the **pension** fund
3. Reduced payout from our **endowment** funds
4. Financial demands of accumulated **deferred maintenance**
5. Projected increases in **interest rates**
6. Set asides for applications to major **research** competitions
7. Special **constraints** for Quebec universities

Bill 100

- Bill 100 requires all Quebec universities to:
 - reduce “general administrative operating expenses” by a total of 10 percent over the next four years;
 - develop a four-year plan to reduce the number of general administrative staff through attrition (one replacement for every two departures);
 - place limits on salary increases for selected managerial and administrative staff.

Sustaining excellence with resource constraints

- obstacles, barriers, and means of dealing with a period **economic austerity**
- **trade-offs** without compromising “quality and access”
- reduce on-going **liabilities and carrying costs**
- **efficiencies** and productivity gains
- **consequences** of accumulated operating deficit, capital debts, and the requirement to repay them
- augmenting and diversifying **revenue streams**



**“Yesterday’s home runs
don’t win today’s games.”
Babe Ruth**



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Thank you

- “Management is efficiency in climbing the ladder of success; leadership determines whether the ladder is leaning against the right wall.”
— Stephen R. Covey
- “Desire is the key to motivation, but it's determination and commitment to an unrelenting pursuit of your goal - a commitment to excellence - that will enable you to attain the success you seek.”
— Mario Andretti
- We, in the administration, recognize, appreciate, and thank you for the important work you do for McGill.

12:00 – 1:00: Lunch



Discussion and Feedback

Questions?

Comments?

Concerns?

Suggestions?