

# The University of



## Comprehensive Institutional Plan, 2011-12 to 2013-14

4401 University Drive, Lethbridge, AB  
[www.ulethbridge.ca](http://www.ulethbridge.ca)

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## 1. Executive Summary

The University of Lethbridge is a public, board-governed university operating as a Comprehensive Academic and Research Institution under the authority of the Post-secondary Learning Act of Alberta. According to its Mission, the U of L “exists to build a better society” and its vision is to “continue to build a comprehensive university that advances its sense of community, engagement, diversity, and connection.”

### *Trends*

An environmental scan notes several trends that affect the University and will continue to do so in the near future. There will be a decline in 18-24 year olds in the Lethbridge region over the next decade. Transition rates of high school students to post-secondary education will improve but still remain low for the region. A rising number of baccalaureate degree granting institutions are affecting transfer applications to the U of L. Enrolments have grown by about 26% over the last ten years and the University gave offers to 97% of qualified applicants. Application behaviour has shifted since 2009, with more applicants delaying their application until late in the enrolment season. The number of graduates has risen by almost 50% since 2000-01 but retention rates from the first to second year have stayed almost the same. While the number of visa students has nearly doubled in the past decade, since 2005-06 this number has declined. There have been rising numbers of FNMI students, though accurate data is hard to collect, and retention rates for these students tend to be about 10% lower. While new construction like Markin Hall has helped alleviate an acute, ongoing lack of space, deferred maintenance on existing facilities continues to grow. Uncertainty regarding government grants produces difficulty in planning beyond the current budget year. Calgary campus enrolment has grown by 34% over the last five years, while the Lethbridge and Edmonton campus populations have stayed relatively stable.

### *Goals and Programming*

<b>GOALS</b>	<b>Access</b>	<ol style="list-style-type: none"> <li>1. Manage our enrolment, using targeted growth.</li> <li>2. Increase graduate degree opportunities.</li> <li>3. Increase access and participation of FNMI students in U of L programs.</li> <li>4. Build bridges with high school students in the southern AB region to make the U of L their first choice.</li> <li>5. Enhance the student experience.</li> <li>6. Increase students' success in their academic endeavours.</li> <li>7. Enhance the Library as a centre and community of learning.</li> <li>8. Incorporate career development theory in student support services.</li> <li>9. Enhance student learning through innovative uses of technology in teaching and learning.</li> <li>10. Address issues of financial literacy and direct financial support by demonstrating the value of postsecondary education and helping parents and students identify a realistic path.</li> <li>11. Promote campus diversity by enhancing accessibility to students from around the world.</li> <li>12. Enhance accessibility for non-traditional students, including adult learners and immigrant and permanent resident learners.</li> </ol>
	<b>Community</b>	<ol style="list-style-type: none"> <li>1. Continue to connect with the local and provincial community to offer educational, recreational, and cultural opportunities.</li> <li>2. Develop and maintain collaborative research projects that enhance our response to international, national, provincial, and local community needs.</li> <li>3. Support and expand the Calgary and Edmonton campuses.</li> </ol>

<b>PROGRAMMING</b>	<b>Program Expansions</b>	<ul style="list-style-type: none"> <li>• B.Ed.</li> <li>• B.Mgt., part-time</li> </ul>
	<b>Partially Funded Expansions</b>	<ul style="list-style-type: none"> <li>• B.H.Sc., Major in Addictions Counselling.</li> <li>• B.H.Sc., Major in Public Health</li> </ul>
	<b>Unfunded Programs</b>	<ul style="list-style-type: none"> <li>• M.F.A.</li> <li>• M.Mus.</li> <li>• B.A. and B.Sc., Major in Rural and Urban Planning and Design</li> <li>• B.Mus., Major in Digital Audio Arts</li> </ul>
	<b>New Programs</b>	<ul style="list-style-type: none"> <li>• Ph.D. in Chemistry</li> <li>• Ph.D. in Education</li> <li>• Ph.D. in Health</li> <li>• Ph.D. programs in social sciences and humanities</li> <li>• Master of Health Sciences in Addictions Counselling</li> <li>• Master of Nursing</li> <li>• M.Sc. in Imaging Science</li> <li>• B.A., Major in Spanish</li> <li>• B.A./B.Sc. Multidisciplinary Studies in Trades Technology Occupations</li> <li>• B.Ed. (Niisitapi)</li> <li>• B.F.A., Majors in Fashion Design and Interior Design (with Lethbridge College)</li> <li>• B.H.Sc., Major in Aboriginal Health Studies</li> <li>• B.Mgt./B.F.A. (New Media)</li> <li>• B.Mgt./B.H.Sc. (Public Health)</li> <li>• B.Sc., Major in Applied Statistics</li> <li>• Accounting Bridging Program</li> </ul>

### *Budget*

The U of L's Operating Budget for fiscal year 2011-12 is \$151,215,273, an increase of 0.99% from the previous year. Reductions are expected for the following three years with the assumption that the government operating grant will remain constant and that student enrolment will see limited growth.

In line with the Tuition Fee Policy Guide, instructional fees are proposed to increase by 0.35% in 2011-12 and 1% in 2012-13 and 2013-14. In the 2011-12 operating budget, fee revenues account for 26% of the general operating revenue. All changes to annual fees and rates charged to students are reviewed by a Student Fee Review Committee and approved by the Board of Governors.

### *Capital Plan*

The highest capital priority for the University is a new science complex to deliver current science programs and accommodate the University's commitment to research. The University also needs to maximize existing space. The average age of the 41 buildings on campus is 20 years, and there are about \$110 million in deferred maintenance projects over the next ten years.

The major capital projects over the next five years and recently-completed projects like Markin Hall will require \$3M in lights-on funding to maintain these facilities.

The U of L relies heavily on the Province of Alberta to fund capital projects, but also uses funds from research agencies, fund raising, and the University's own contributions. University Advancement is working to identify fundraising priorities for projects and funding. The University cannot continue to rely on capital reserves to make up shortfalls in capital budgets.

## 2. Accountability Statement

This Comprehensive Institutional Plan was prepared under the Board's direction in accordance with legislation and associated ministerial guidelines, and in consideration of all policy decisions and material, economic, or fiscal implications of which the Board is aware.

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Robert Turner  
Chair, Board of Governors

### 3. Institutional Context

#### *Institutional Mandate*

The University of Lethbridge is a public, board-governed university operating as a Comprehensive Academic and Research Institution under the authority of the Post-secondary Learning Act of Alberta.

Founded on the principles of liberal education, the University of Lethbridge provides undergraduate and graduate programs in education, fine arts, health sciences, humanities, management, nursing, sciences, and social sciences, leading to bachelor's, master's, and doctoral degrees. The institution also provides certificate programs, post-baccalaureate certificate programs, post-graduate certificate programs, post-masters certificate programs, programs and degrees that lead to professional specialization, and open studies for lifelong learners.

The University of Lethbridge conducts pure and applied research and establishes and sustains facilities for pursuing original research. The University develops centres of research excellence in areas in which it has special expertise or that have particular relevance to the region or province. Programs of research, scholarship, and creative activity include the study of fundamental issues for their intrinsic intellectual, aesthetic, or philosophical interest, and of practical challenges of direct importance for social, cultural, economic, or environmental well-being. The University of Lethbridge protects free inquiry and scholarship, facilitates access to scholarly resources, and supports artistic expression and the free and open scholarly discussion of issues.

In support of Campus Alberta, the University of Lethbridge collaborates with other institutions to ensure transferability within the province's post-secondary education system and deliver seamless learning opportunities. As part of this commitment, the University works with other institutions to provide degree completion opportunities for university transfer students and diploma graduates.

Across the spectrum of intellectual pursuit, the University of Lethbridge continually develops innovative programs and research collections in existing and emerging disciplines to meet the needs of students, society, and the economy. This includes collaborating with First Nations, Métis, and Inuit peoples to develop programs and collections that are relevant and accessible to them.

The University of Lethbridge serves a variety of student groups: undergraduate and graduate students; transfer students; high school graduates; First Nations, Métis, and Inuit students; adult learners; international students; and immigrants. It also serves students on campuses in Edmonton and Calgary and, through distance learning technology, students across the province, the country, and the world. The University of Lethbridge strives to make university-level education available to all Albertans, including those living outside major urban centres and those who have traditionally not sought university education.

The University of Lethbridge fosters a learning community that meets the educational and personal growth needs of its students. This learning community emphasizes teaching excellence, exposure to research, information literacy, interaction with professors and instructors, effective academic advising and personal counselling, and a spectrum of cultural, recreational and extracurricular opportunities. The University of Lethbridge values a high quality of teaching and emphasizes the mutually beneficial relationship between teaching and research. Other facilities and services, such as the Library, student residences, health services, theatres and other performance spaces, and sports and recreation facilities support and enrich the student experience and the lives of community members while respecting environmental sustainability. The University strives to enhance its educational environment through innovation and creativity.

The University of Lethbridge builds mutually supportive relationships and partnerships, addresses the cultural and societal needs of the communities it touches, and advocates the critical role that education plays in the growth and well-being of an informed society. The University further contributes to society by discovering, preserving, synthesizing, and disseminating knowledge for the benefit of all.

*Approved by Doug Horner, Deputy Premier and Minister of Advanced Education and Technology, June 24, 2010.*



### *Mission: Why We Exist*

**The University of Lethbridge exists to build a better society.**

We do this in six essential ways:

1. We prepare students for their personal and professional paths.
2. We develop creative discoverers and independent learners at the undergraduate and graduate levels.
3. We create, discover, disseminate, and apply knowledge through excellence in basic and applied research of regional and global impact.
4. We encourage and nurture creative expression.
5. We pursue community engagement.
6. We value, encourage, and celebrate the talents and efforts of our students, faculty, staff, and alumni.

### *Vision: Where We Are Going*

**The University of Lethbridge will continue to build a comprehensive university that advances its sense of community, engagement, diversity, and connection.**

The University of Lethbridge will be the institution of choice for those seeking an intimate and supportive environment, excellence in research and creative activity, an engaging and challenging learning experience, and respect for diversity. We will continue to broaden the scope of our programs and research while staying committed to our founding principles of liberal education and retaining the intimate academic experiences on which we have established a tradition of excellence.

We will welcome our students to a community of scholars that offers relevant and academically challenging programs. Opportunities for engagement in learning and research will exist across all disciplines and levels of program, from undergraduate to graduate. Rigorous research and creative work will continue to form the basis for inquiry and teaching across the learning contexts we provide.

Our University will continue to increase the diversity of its scholarly activity and contributions. In achieving this we will be defined by collegiality.

The University of Lethbridge community – which includes all students, faculty, staff, and alumni who contribute to its operation and success – will extend beyond the walls of our institution. We will remain an integral part of our communities while fostering scholarly contributions of international excellence. We will support and enrich the diverse communities we serve with fresh insights and new directions.

### *Fundamental Principles*

#### *Our Commitment to Society*

**We cultivate responsible citizenship.** The University develops and promotes good citizens who contribute to the building of better societies by applying their knowledge, skills, creativity, and powers of critical inquiry for the improvement of regional and global communities.

**We protect and encourage free inquiry and expression.** In keeping with the unique mandate of the university in society, the University of Lethbridge supports and protects artistic expression and the free and open scholarly discussion of issues, including those that are controversial. In the tradition of academic freedom, the University models collegial and civil debate, dissent, and controversy to critically explore and resolve issues in an atmosphere of professionalism, respect, and good will. We also have an obligation to address long-term issues and those of broad scope.

**We work for the public good.** As a public institution, the University of Lethbridge promotes and provides degree-level education for the public good and anticipates and responds to societal needs. The

University bases its decisions about programs, standards, and capacity on the best available evidence. Within that context, we use innovative methods and processes to optimize the openness of the institution to qualified students.

**We are connected with the community.** The University publicizes its research, scholarship, creative activities, and other initiatives that have significance for society. Members of the University contribute to the community based on their professional expertise. The University develops relationships with organizations and individuals, and shares its facilities and resources for the good of the community. We acknowledge faculty, staff, students, and alumni for initiative and creativity that leads to the increased involvement of the University in the community.

The University of Lethbridge values its close and mutually supportive relationship with its alumni, who exemplify the benefits of the University and communicate its value locally, provincially, nationally, and globally.

**We adopt a global perspective.** Social, political, and economic divisions across the globe threaten the peace and prosperity of all. We nourish a global mindset in our students, faculty, staff, and alumni that facilitates cultural awareness and sensitivity that leads to a mature understanding and appreciation of the things that divide and unite us.

**We promote diversity and ensure equal opportunity for participation.** Diversity strengthens the University and enriches the experience of our students, staff, faculty members, and alumni. We respect, appreciate, and encourage diversity, and provide equal opportunity for full participation in the University. We are an inclusive community, in which students, staff, faculty members, and alumni feel welcome, respected, valued, and empowered to contribute fully. The University facilitates accessibility by all students, staff, faculty members, and alumni to the intellectual, physical, and social aspects of the institution.

**We promote gender equity.** The University of Lethbridge honours the rights of all and treats people with dignity and respect. We acknowledge the similarities and differences among women and men, and seek to remove all barriers that inhibit an individual's aspirations and potential. The University will create a supportive environment through education and communication. Equity is inclusive.

**We increase the participation of FNMI peoples in all aspects of the University community.** The University of Lethbridge values its relationship with FNMI peoples, and collaborates widely to develop programs that are relevant and available to them. We work with FNMI peoples to ensure that these partnerships, and the resulting programs, continue to meet all students' needs.

**We promote a healthy lifestyle for our students, faculty, and staff.** The U of L offers proactive health education, on-site health care, and health insurance information. We work to provide non-judgmental and confidential health care in a safe and caring environment. University facilities and programs provide opportunities to participate in sport, exercise, and recreation.

### Our Commitment to Creativity, Inquiry, and Discovery

**We encourage and support research, scholarship, and creative work.** The University of Lethbridge stimulates and supports research, scholarship, and creative work in all areas in which we teach, and in areas of special relevance to the region and province. This link between research and teaching allows us to explore what is known, challenge how it is known, and thus influence the nature of teaching. We value and protect an environment of free inquiry in which to conduct research, scholarship, and creative work, and communicate the results of these activities with others. We conduct ourselves on the basis of informed, evidence-based practice. We encourage students at all levels to become involved in research, scholarship, and creative activity.

**We conduct research in many forms.** Given the range of disciplines involved, research at the University takes many forms, including that with the broadest scope and longest term. The University has a responsibility to analyze and reflect on these matters, and to communicate the outcome of these efforts.

We believe that research—intellectual inquiry, study, and artistic investigation aimed at establishing facts and reaching new conclusions—is an inherent societal good and an end in itself. But, wherever possible, we connect our research to the needs and aspirations of the communities we serve.

### Our Commitment to Students

**We give students the best preparation for their future.** The University of Lethbridge provides students with a liberal education—a solid foundation for personal and professional growth. Liberal education promotes the development of academic skills that students can apply to a wide range of experiences, and a broad base of knowledge in the human, aesthetic, ethical, scientific, and organizational disciplines. It encourages a multi-faceted, reflective approach to the complex challenges of the 21st century.

**We strive to develop a culture of achievement and motivation among students.** The U of L helps students to identify strengths and overcome weaknesses. We seek to foster: a sense of responsibility for students' learning and personal development; effective student relations to peers and teachers; and student involvement in local, provincial, and national communities.

**We are student-centred.** Students give focus and meaning to the University of Lethbridge. The University helps students achieve their full potential by facilitating their intellectual growth and academic and personal excellence. To this end, the University maintains high academic standards and excellent programs, supported by high-quality, responsive services.

The University of Lethbridge supports and encourages the growth of students as whole persons, in an atmosphere of engagement, freedom from discrimination, and responsible use of authority.

**We are a comprehensive university.** Broad in scope, we offer undergraduate and graduate university education across Faculties and Schools and apply a balance between our focus on teaching and our commitment to research, scholarship, and creative activities.

**We believe in excellence in undergraduate education.** The University of Lethbridge treasures its reputation for quality, responsiveness, and innovation at the undergraduate level. We will continue to enhance our reputation as an institution offering outstanding programming to undergraduate students in a comprehensive university environment. We enhance our value for students and society by concentrating on fields that reflect the excellence of our faculty members and the interests of both students and society.

**We are fully engaged in graduate education.** The University of Lethbridge offers masters and doctoral programming, and we integrate graduate studies with undergraduate and research programs. Through our graduate offerings across all academic units, we contribute to our students' personal, intellectual, and professional development and help meet society's need for citizens with the highest levels of professional and intellectual achievement.

**We promote effective teaching and learning.** For the undergraduate student, we promote primarily face-to-face learning, which reflects our belief that people benefit from spending time working together in the same place. We provide online and distance learning for courses and programs where these delivery modes make the best sense. Our use of appropriate technology permeates teaching and learning activities, enhancing both.

### Our Commitment to Inspiration

**We inspire.** The University of Lethbridge aspires to inspirational teaching that ignites intellectual passion and stimulates a thirst for knowledge. We value and support many approaches to teaching and learning, in a variety of settings within the University and in the broader community.

**We believe education is a journey, not a destination.** A true measure of our success is our alumni's continuing interest in a lifetime of learning, and their commitment to this goal. The University welcomes those students pursuing degrees and those taking courses out of general interest and intellectual curiosity. We are open to offering quality programs for degree completion and programs that are approved and recommended by professional associations and organizations.

**We expand horizons.** A global perspective is essential to the University of Lethbridge in its teaching, learning, and research. The University educates its students to become well-rounded citizens of a complex society, capable of making important contributions in Canada and elsewhere in the world.

The University of Lethbridge invites students and faculty members from around the world to participate in learning at the University, and provides international opportunities for our students and faculty members to experience other cultures.

#### Our Commitment to Responsible Action

**We advance the interests of the University of Lethbridge.** The University of Lethbridge communicates with its internal and external communities so that its mission, goals, and work are well understood. We engage our alumni and other supporters in the activities of the University. We build the value of the University to society by developing mutually supportive relationships with governments, individuals, and organizations.

**We practice procedural fairness.** All internal and external University processes are fair, open, and transparent. We act in accordance with all applicable codes of professional and ethical practice, and practice professionalism and civility in all interactions.

**We are active and innovative in recruitment and retention.** In developing a coordinated approach to recruiting and retaining excellent faculty members and staff, the University of Lethbridge pursues new and innovative ideas, implements the most effective strategies, and monitors their success. We encourage and pursue the training and professional development of all our people.

**We practice sound financial and resource management.** The University of Lethbridge maintains exemplary financial management of our public and private funds and resources. We practice resource management in a transparent manner.

**We use technology effectively.** We use technology to facilitate and enhance, not supplant, learning and research relationships among students, faculty members, and other university stakeholders. The University considers technology a means, not an end.

**We are environmentally and socially responsible.** When making decisions about the design and operation of the University of Lethbridge, we act ethically and responsibly, considering environmental sustainability and good citizenship.

## 4. Plan Development

The University of Lethbridge used a consultative process to develop this Comprehensive Institutional Plan. The original Institutional Access Plan and the Business Plan, upon which this CIP is partly based, were themselves developed in consultation with senior management, Deans, Executive Directors, faculty members, and staff members.

The CIP development process followed a similar pattern. It was developed by the Office of the Vice President (Academic), and involved several stages of consultation, with several groups. Before the first draft was completed, many sections were released for input and revision to various units on campus, such as Institutional Analysis, Financial Services, and the Faculties, and several faculty members were consulted on new program development. The first drafts of the plan were released for discussion and comment to the Deans and Associate Deans, Executive Directors, and the Library. Subsequent drafts were released to these groups plus the President, Vice Presidents, Executive Directors, and other staff and faculty members as required. The Board of Governors reviewed and approved the final version.

The U of L also consulted Advanced Education and Technology during CIP development. As questions arose, we consulted with various staff members in the Strategic Directions unit of Advanced Education and Technology. The U of L met with AET to discuss the plan on December 17, 2010 and incorporated feedback and comments from that meeting into subsequent drafts.

*Table 1: Groups Consulted in CIP Development*

<b>Senior Management</b> – President, Vice President (Academic), Vice President (Finance and Administration), Vice President (Research), Vice President (Advancement), Associate Vice President (Academic)
<b>Deans and Associate Deans</b> – Faculties of Arts and Science, Education, Fine Arts, Health Sciences, Management, Graduate Studies
<b>Executive Directors</b> – Ancillary Services, Information Technology, Registrar’s Office and Student Services, Human Resources, Sport and Recreation Services
<b>Library</b>
<b>Institutional Analysis</b>
<b>Financial Planning</b>
<b>Financial Services</b>
<b>Faculty members</b> – as required, for new programming
<b>Alberta Advanced Education and Technology</b> – Strategic Directions unit

Several planning documents, which included considerable consultation in their development, were used in developing the CIP, as were planning documents from the Alberta Government (see Table 2).

*Table 2: Document Inputs to the CIP*

<b>University of Lethbridge Documents</b>	<p><b>2009 and 2010 Institutional Access Plan</b> – A revised and updated version of the IAP now forms the core of section 6 of the CIP. The IAPs were developed in consultation with the Faculties, administrative units, senior management, and AET.</p> <p><b>Strategic Plan 2009-13</b> – Developed in consultation with a wide variety of internal and external groups, the U of L Strategic Plan defines who we are, where we are going, our fundamental principles, and several priority strategic directions to help us achieve our collective vision for the institution.</p> <p><b>Academic Plan</b> – The development of this plan overlapped with the development of the CIP, and its directions informed this document. The Academic Plan emphasizes three Academic Directions: Leadership in Learning, Supporting the Student Experience, and Creating a Community of Learners</p> <p><b>Business Plan</b> – Previously submitted annually to AET, the content from this plan now forms part of the CIP content.</p> <p><b>Annual Report</b> – Submitted to AET, the Annual Reports track progress on initiatives and goals from the Business Plan.</p> <p><b>Campus Space Report</b> – The report, which identifies space needs to 2018, was developed in consultation with faculty and staff from senior administration, the Faculties, Registrar’s Office, and administrative units.</p> <p><b>Capital Plan</b> – Submitted to the Government of Alberta annually, the Capital Plan presents the U of L’s capital priorities, which are aligned with the Government’s Strategic Capital Plan, and are the result of ongoing consultation with Ministers and other Government officials.</p> <p><b>Setting Enrolment Directions</b> – This internal document sets out five strategic enrolment directions for enrolment management at the U of L. It was developed in consultation with senior administration, the Faculties, and the Registrar’s Office.</p>
<b>AET Documents</b>	<p><b>Alberta Access Planning Framework</b></p> <p><b>Roles and Mandates Policy Framework</b></p> <p><b>Alberta Advanced Education and Technology 2009-12 Business Plan Highlights</b></p> <p><b>Campus Alberta Planning Framework 2010: Profiling Alberta’s Advanced Education System</b></p> <p><b>Alberta’s 20-Year Strategic Capital Plan</b></p>

## 5. Environmental Scan

### Population Trends

#### A Changing Demographic

The Campus Alberta Planning Framework (CAPF) anticipates that Alberta will have a 3% decline in the number of 18-34 year olds from 2009 to 2019; the number of 18-34 year olds in the Lethbridge region is anticipated to grow by 7.1% in this time. While this group is expected to grow overall, growth is expected to be seen in the 25-34 year old population. The Lethbridge region is projected to have an 8.6% decline among 18-24 year olds and a 19.6% growth among 25-34 year olds.

**Table 3: Lethbridge Region 10-year Population Projection, 28-34 year olds**

	2009	2019	% Change
18-24 years	20,254	18,509	-8.6%
25-34 years	25,224	30,162	19.6%
<b>Lethbridge Region</b>	<b>45,478</b>	<b>48,691</b>	<b>7.1%</b>

Source: Alberta Finance and Enterprise, Statistics Canada, 2010

**What this means for the U of L:** In the 2009-10 academic year, 74% of FLEs<sup>1</sup> at the University of Lethbridge were 18-24 years old. Given the increased number of baccalaureate degree opportunities in Calgary and Edmonton (where the largest numbers of 18-24 year olds exist) and the fact that about 35% of FLEs are from the Lethbridge Region (which will see a growth in 25-34 year olds), serving the needs of the adult learner will be key to the U of L mitigating the likely decline in the primary post-secondary population.

#### High School Transitions

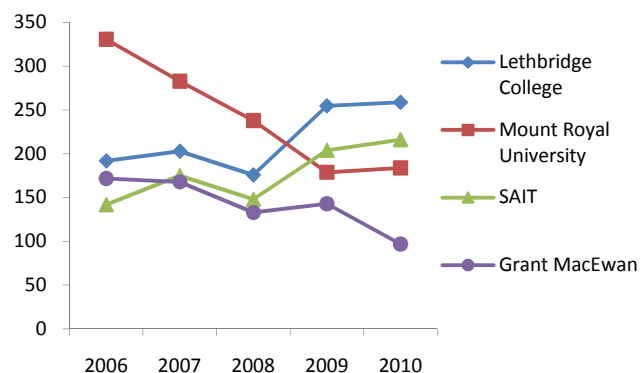
Approximately 37.9% of Lethbridge Region high school students transition directly to post-secondary education. This is in line with the provincial four-year transition rate of 37.5%. The six-year transition rate improves to 58.8% for the Lethbridge Region and 59.8% for the province. In June 2009, there were 1500 high school graduates in the Lethbridge region, and 580 of these students entered post-secondary in Alberta. Of these, 219 enrolled at U of L.

**What this means for the U of L:** Once again, given the anticipated decline in the region's 18-24 year old population, it will not only be necessary to attract a large portion of the student body from outside of the Lethbridge region, but also to engage a greater proportion of high school graduates in the region.

### Campus Alberta

#### Increased Competition

The rising number of baccalaureate degree granting institutions has resulted in increased competition for new students and a smaller pool of transfer students for U of L. Mount Royal University has historically been the primary source of transfer students for U of L. With the shift to the Roles and Mandates Framework, the U of L has seen a marked decline in transfer applications from Mount Royal and Grant MacEwan. At the same time, the number of transfer applications has increased from Lethbridge College and SAIT.



**Figure 1: New Transfer Student Applications by Sending Institution, Fall 2006 to 2010**

<sup>1</sup> FLE: Full Load Equivalents

**What this means for the U of L:** The increased number of baccalaureate degree granting institutions challenges the U of L to maintain enrolments. Building on our existing strength as a receiving institution for transfer students will be critical to our success. SAIT’s announcement that it will offer a bachelor of business administration (accounting) poses a significant risk to these transfer numbers.

At the same time, the increasing number of degree opportunities for students is a strategic opportunity for the U of L to build our graduate student population. It will be key for U of L to be actively involved through Campus Alberta program approval stages to ensure that new undergraduate programs mesh with graduate-level programming.

### Role of Graduate Studies

With the clear definition of graduate studies and research as part of U of L’s institutional mandate in the Campus Alberta framework, the traditional model of “special case” graduate studies is no longer reflective of the role of graduate studies at U of L. With the shift away from the special case model comes the need for more formal graduate-level courses.

**What this means for the U of L:** While there are resource challenges to provide strong programs and to competitively recruit and retain graduate students, it is also our distinguishing strength from the new baccalaureate degree granting institutions. In a difficult fiscal environment, resource decisions will need to balance a dedication to undergraduate student priorities and a growing graduate student population. New graduate-level courses will be developed to take advantage of economies of scale and structure courses to take advantage of common instructional needs across departments.

### Demand and Access

#### Access

Over the last 10 years, the University of Lethbridge has grown substantially, with enrolments rising about 26%.

According to the Application Submission Initiative<sup>2</sup> there are a large number of qualified applicants across the province who are not receiving offers. However, this is not true for the University of Lethbridge. In Fall 2009, the U of L had 4,728 applicants from Alberta. Of those applicants, 82% were qualified for admission and 97% of qualified applicants received offers. Only 0.7% of those that were qualified to attend U of L were not accommodated by any Alberta post-secondary institution.

**Table 4: 10-Year Change by Level and Faculty (FLEs)**

Level	Faculty	2000-01	2009-10	% Change
Undergraduate	Arts & Science	3,289	3,460	5%
	Education	428	449	5%
	Fine Arts	384	561	46%
	Health Sciences	88	434	396%
	Management	1,121	1,456	30%
Graduate		193	550	185%
<b>TOTAL</b>		<b>5,503</b>	<b>6,911</b>	<b>26%</b>

Source: AET Learner Enrolment Reporting System

**What this means for the U of L:** The U of L has excelled at providing access to postsecondary education. We will continue to expand access to all students, with a focus on opportunities for traditionally underrepresented groups.

<sup>2</sup> The Application Submission Initiative was conducted by AET provides application data for institutions across the province.



## Application Behaviour

The 2009 recruitment season (beginning in fall 2008), brought a fundamental shift in student application activity. In January and February 2009, student applications were about 20% lower than the same time in previous years. This trend was seen again in the 2010 recruitment season. More applicants delayed their application until very late in the enrolment season.

**What this means for the U of L:** The perception of deadline and the meaning of “late” have changed. This new behaviour is a challenge for the University, as it is becoming increasingly difficult to anticipate Fall enrolment based on historical trends. This has implications for various activities, including scheduling and admissions.

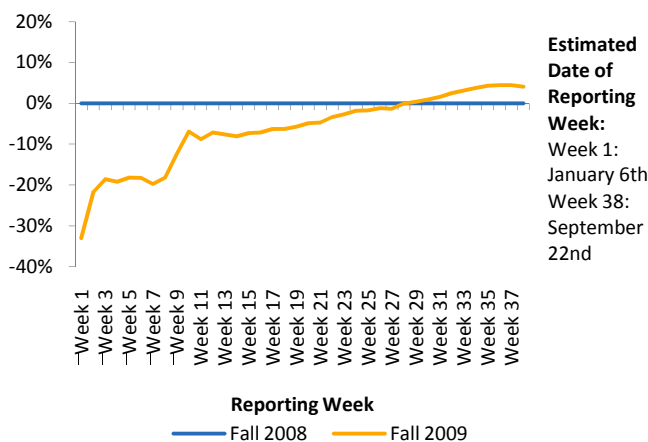


Figure 2: Percentage Change in the Number of Applicants by Reporting Week, Fall 2008 to 2009

## Student Outcomes

The number of students graduating from the U of L has grown over the last ten years, with nearly 50% more students graduating in the 2009-10 convocation ceremonies than in 2000-01.

While the number of graduates has increased, retention rates from first to second year have remained close to the same. The number of new high-school entry first-year undergraduates returning in second year has ranged between 70 and 74%.

In the last five years, program completion rates for students who enter from high school have been between 50 and 57%, and program completion rates for students entering with prior postsecondary course credits have ranged from 76 to 78%.

**What this means for the U of L:** While the U of L has done well at providing access to postsecondary education for Alberta students, we continue to work at providing better outcomes to those students, reflected in retention and program completion rates.

## International Students

The number of visa students at U of L has nearly doubled in the last ten years. However, since 2005-06 there has been a decline in this number.

**What this means for the U of L:** Enhancing access for students from around the world enhance the experience of all U of L students by promoting international diversity. The U of L is working to stabilize international student numbers at a level that allows us to provide the appropriate resources to these students.

## Aboriginal Students

In general, U of L has seen an increase in attendance by FNMI students, though this number is not necessarily an accurate representation as it relies on self-declaration of Native status. The U of L has developed several initiatives to improve support and participation of First Nations students, including: the First Nations Transition Program; the Niitsitapi Teacher Education Program; the Bachelor of Management in First Nations' Governance; and the hiring of a Native Student Advisor. Despite the contributions of many of these initiatives, retention rates for FNMI students in their first year of an undergraduate degree program are approximately 10% lower than the overall-first year population.

**What this means for the U of L:** Given our location next to the largest Reserve in Canada, the U of L is uniquely positioned to increase First Nations involvement in postsecondary education. We are challenged to continue to develop innovative approaches to increase access to and to engage FNMI students. Many of these programs have been offered on an ad hoc basis and the next stage in delivering these supports will be to implement them in a sustained and coordinated way.

## *Facilities & Resources*

### *Space*

In Fall 2010, the U of L officially opened Markin Hall, the new home to the Faculties of Management and Health Sciences. The new space, together with the conversion of the vacated space, helps to address current space needs for classroom, office, and student residence spaces. From the APPA: The Association of Higher Education Facilities Officers Facilities Condition Audit, the University identified approximately \$110 million in deferred maintenance projects over the next ten years.

**What this means for the U of L:** While new construction on campus has helped alleviate an acute, ongoing lack of space, deferred maintenance on existing facilities continues to grow and is of great concern for the University. The addition of Markin Hall in 2010 and renovations to the vacated spaces in University Hall and Anderson Hall provides much needed additional space to accommodate our current enrolment and office needs, but it will not address the extreme need for labs. As well, with new space comes additional continuing costs. The costs of a new building does not end with construction; lights-on funding is needed to operate and maintain new buildings.

### *Grants and Employee Costs*

Like other institutions in Alberta, the U of L faces fiscal uncertainty related to the government grants. At the same time, we will be entering a period of relative certainty as it relates to our collective agreements. In 2010, negotiations between the University and the University of Lethbridge Faculty Association concluded in a new collective agreement. In addition, a first agreement was reached with the Graduate Students' Association regarding graduate assistant appointments. We will be entering negotiations with the Alberta Union of Public Employees on campus as that agreement expires in 2011.

**What this means for the U of L:** With U of L's two major employee groups set to be covered under new collective agreements by the end of 2011, the U of L is well positioned to anticipate salary and benefit costs – one stable factor in an otherwise uncertain fiscal environment. At the same time, the uncertainty surrounding government grants makes it difficult to plan beyond the current budget year.

### *Three Campus Model*

One of U of L's strengths in the Campus Alberta framework is our three campus model. Over the last five years there has been a shift in the proportion of students on the U of L campuses in Lethbridge, Calgary, and Edmonton. Calgary campus enrolment has grown by 34% while Lethbridge and Edmonton have remained stable. The main reasons for these changes are the increasing mature student population in Calgary, students choosing to stay closer to home in the current economic climate, and increased course offerings at the northern campuses.

**What this means for the U of L:** The U of L has positioned itself to serve the adult learner by developing the right programs in the right locations. Our challenge will be to continue to develop programs and delivery methods to enhance access for adult and non-traditional learners across the province.

## 6. Goals, Priority Initiatives, Expected Outcomes, and Performance Measures

### *Access*

#### Enrolment Plan

	ACTUAL					PROJECTED			
	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14
<b>Undergraduate</b>	6,520	6,520	6,503	6,296	6,361	6,481	6,486	6,512	6,545
<b>Graduate</b>	454	429	435	393	550	624	629	633	638
<b>Total</b>	6,974	6,949	6,938	6,689	6,911	7,105	7,115	7,145	7,183

**Note:** These figures are in Full Load Equivalents (FLEs). The projected figures only include those new programs that will operate on internal resources; new programs that will require government funding have not been included.

#### Program Expansions

PROGRAM	RATIONALE	FUNDING SOURCE
<b>B.Ed.</b>	This expansion will allow the Faculty of Education to offer the Teacher Education Program to an additional cohort.	Govt. funding.
<b>B.Mgt. - Part-time</b>	This part-time offering of the existing B.Mgt. program in Edmonton and Calgary responds to demand for business credentials for working professionals.	Govt. funding.

#### *Partially Funded Program Expansions*

There are two program expansions in the Faculty of Health Sciences that have been only partially funded – the **B.H.Sc. in Addictions Counselling** and the **B.H.Sc. in Public Health**. The Faculty of Health Sciences received funding for the first two years of these program expansions and were left to deliver the last two years to students without funding. In both cases, the Faculty had to reduce intakes to handle the lack of funding.

## Unfunded Programs

The following are approved programs in areas of uniqueness to the region and/or high demand, that are currently unfunded by the Government of Alberta. We are currently running three out of the four programs using existing resources; the B.A./B.Sc. program in planning is not being offered due to lack of funding. To reach the full potential of these programs and to sustain them over the long term, the U of L plans to submit them for Government funding in the future.

PROGRAM	DESCRIPTION
<b>MASTERS PROGRAMS</b>	
<b>Master of Fine Arts</b>	The M.F.A. program prepares graduates for future endeavours in the professional field of their practice and also qualifies them to teach in post-secondary institutions or community-based organizations. Without government funding support, this program cannot be sustained beyond the initial period of implementation.
<b>Master of Music</b>	The M.Mus. is a finishing degree for those students wishing to go on in the performance discipline and is a bridging degree for those considering teaching in a post-secondary institution (which requires the terminal Doctor of Musical Arts degree). Again, without government funding support we cannot sustain this program beyond the initial implementation period.
<b>UNDERGRADUATE PROGRAMS</b>	
<b>Bachelor of Arts and Bachelor of Science in Rural and Urban Planning and Design</b>	This Major responds to the rapidly expanding need for planners and designers to develop creative solutions for the continuing growth in Alberta. Three streams – Architecture and Design, Planning, and Community and Rural Development – will provide students with enhanced knowledge of the evolving complexities of agriculture and food systems, rural social organization, legal and policy issues in planning, environmental challenges and public administration of these regions. We are not currently offering this program due to lack of funding.
<b>Bachelor of Music, Major in Digital Audio Arts</b>	This program aims to produce experts in the field of digital audio arts whose skill sets match the needs of the industry today and in the future. The only program of its kind in western Canada, the Digital Audio Arts major is presently limited to an enrolment of 32 per year due to lab, classroom, and budgetary constraints.

## New Programs

The following are the priority new programs for development at the University of Lethbridge over the next three years. Additional ideas for future programming are in *Appendix One*.

	PROGRAM	PROJECTED FUNDING SOURCE	PLANNED IMPLEMENTATION YEAR
GRADUATE	Ph.D. in Chemistry	No govt. funding required for program initiation.	2012
	Ph.D. in Education	Govt. funding.	2011
	Ph.D. in Health	Govt. funding	TBA – when funding is available.
	Ph.D. programs in social sciences and humanities	Govt. funding	TBA – when funding is available.
	Master of Health Sciences in Addictions Counselling	Govt. funding	TBA – when funding is available.
	Master of Nursing	Govt. funding	TBA – when funding is available.
	M.Sc. in Imaging Science	No govt. funding required for program initiation.	2014
UNDERGRADUATE	B.A., Major in Spanish	No EPE funding required for program initiation.	2012
	B.A./B.Sc. Multidisciplinary Studies in Trades Technology Occupations	No govt. funding required for program initiation.	2012
	B.Ed. (Niitsitapi)	Govt. funding.	TBA – when funding is available.
	B.F.A., Major in Fashion Design and Interior Design	Govt. funding.	TBA – when funding is available.
	B.H.S., Major in Aboriginal Health Studies	Govt. funding.	TBA – when funding is available.
	B.Mgt./ B.F.A. (New Media)	No govt. funding required for program initiation.	2011
	B.Mgt./B.H.S. (Public Health)	No govt. funding required for program initiation.	2012
	B.Sc., Major in Applied Statistics	No govt. funding required for program initiation.	2011
	Accounting Bridging Program	Supported by Institute of Chartered Accountants of Alberta for first three years. Govt. funding required thereafter.	Offered on Edmonton campus, 2010. Expanded to Calgary, 2011.

## Access Goals

**1. Manage our enrolment, using targeted growth.**

Strategy	Performance Indicator
Improve our retention and completion rates using a mix of specific strategies.	Retention rate. Completion rate.
Refocus and redefine our secondary and tertiary markets and increase student enrolment from targeted geographic areas.	Student enrolment from targeted areas.
Develop a comprehensive set of metrics to track and report on transition, retention, and graduation rates.	Transition, retention, and graduation rates metrics and reports.

**NOTE:** See also goal 5. *Enhance the Student Experience* for further strategies related to enrolment management.

**2. Increase graduate degree opportunities.**

Strategy	Performance Indicator
Increase Masters-level and Ph.D.-level degree opportunities across faculties.	Broader distribution of graduate students across the faculties of the University of Lethbridge. Increased number of programs at the Masters and Ph.D. levels.
Enhance graduate recruitment initiatives.	Increased graduate student enrollment.
Continue to recruit and invest in new faculty members with world-class scholarship portfolios.	Increased graduate student enrollment.

**3. Increase access and participation of First Nations, Métis and Inuit (FNMI) students in U of L programs.**

Strategy	Performance Indicator
Continue to enhance and build relationships with FNMI students and their communities.	Increased postsecondary access for FNMI students.
Provide enhanced support for FNMI students.	Increased retention of FNMI students. Increased residence space for FNMI students.

**4. Build bridges with high school students in the southern Alberta region to make the U of L their first choice.**

Strategy	Performance Indicator
Create and expand opportunities for K to 12 students to experience campus life and advance their education.	Number of programs for K to 12 students. Attendance at K to 12 student programs.
Develop and implement various quality campaigns to distinguish the U of L from other postsecondary choices.	Publicity campaigns aimed at high school students.

**5. Enhance the student experience.**

Strategy	Performance Indicator
Enhance and expand support mechanisms and systems for first year students.	Decreased first year student attrition.
Strengthen and expand student advising to provide a higher level of service to entering students.	Increased student satisfaction with advising. Number of students using academic advising.
Help students prepare for the academic transition to postsecondary learning.	Increased student retention.
Develop an online cohort model of support for new high school admits.	Participation in the program. Positive evaluation from program participants regarding ease of transition in first semester. Increased retention in first year.
Provide a mentorship program for non-traditional students.	Participation in the program. Positive evaluation from program participants regarding motivation to apply, register, and attend.
Offer on-campus and outreach university preparation events.	Participation in the program. Positive evaluation from parents. Positive evaluation from program participants regarding motivation to register and attend and the ease of transition in the first semester. Increased clarity of educational and career goals for participants.
Increase amount and interactivity of admissions information provided to students online.	Amount of online admissions information available. Increased satisfaction with and confidence in admission decisions.
Ensure information about U of L programs is consistent across all modes of communication.	Implementation of single-source authoring across multi-channel publication.
Identify and simplify student-impacted processes.	Number of projects underway to identify and simplify student-impacted processes.
Develop online, self-serve services.	Number of projects underway to develop online self-serve services.
Create new opportunities for enhancing student community and connection.	Participation in events and groups. Student evaluation of efficacy of events and groups. Evaluation of reputation of Student Life through contacts with high school counsellors and students.
Create new modes of delivery for study skills and student success workshops.	Number of workshops delivered using new modes of delivery.

**6. Increase students' success in their academic endeavours.**

Strategy	Performance Indicator
Create an online Academic Success program.	Student participation in the program. Student evaluation of the effectiveness of the program after they start studies. Comparison of academic performances of participants and non-participants.
Integrate Academic Success courses with academic advising services for at-risk students.	Greater academic success for at-risk students.

**7. Enhance the Library as a centre and community of learning.**

Strategy	Performance Indicator
Increase the number of group study rooms and create multimedia group study rooms.	Number of group study rooms. Number of group study rooms with multimedia capability.
Purchase software that supports graduate student research and develop a learning centre to instruct students in how to use it.	Purchase of licenses for software that support literature review, data collection, and statistical analysis. Setup of software learning centre.
Continue digitization of Library collections.	Number of digitized works.
Develop a university repository of research in progress.	Action plan for research in progress repository.
Enhance Library services for target groups: graduate students, international students, and FNMI students.	Library to develop action plan with specific performance indicators.
Offer summer courses in information literacy skill open to the public.	Number of information literacy courses offered.
Increase internal collaboration with the Registrar's Office and Student Services.	Number of collaborative projects. Number of collaborative committees.
Increase graduate student information literacy skills and knowledge.	Integration of graduate student information literacy classes and course into all graduate student programs at the Masters level.

**8. Incorporate career development theory in student support services.**

Strategy	Performance Indicator
Expand offerings of credit courses in career planning.	Increased enrolment in career planning courses. Positive student evaluations of these courses.
Incorporate career development into Academic Success workshops and support services for at-risk students.	Increased student awareness of career development. Increased persistence of at-risk students.



Strategy	Performance Indicator
Provide discipline-specific presentations on available career paths.	Attendance at departmental presentations in new student orientation activities.

**9. Enhance student learning through innovative uses of technology in teaching and learning, including blended learning.**

Strategy	Performance Indicator
Use new content delivery mechanisms to increase access to course captures, podcasts, and guest lectures.	Number of hits for online delivery methods.
Increase technology integration in the classroom.	Technology use by instructors and students.
Increase blended learning delivery of courses.	Number of courses offered through web-based and/or videoconference methods. Numbers of students meeting course/program requirements through distance-based methods.

**10. Address issues of financial literacy and direct financial support by demonstrating the value of postsecondary education and helping parents and students identify a realistic financial path.**

Strategy	Performance Indicator
Develop and implement an outreach program on financing education.	Number of parents and students assisted. Parent evaluation of assistance provided. Student feedback on their understanding of financing postsecondary education. Reduction in finances cited as a barrier to postsecondary education.
Provide money management coaching to new and continuing students.	Numbers of students participating in the program. In-program evaluation of students' skills. Increased retention.
Increase direct financial support to students, including targeted groups.	Increased numbers of scholarships, awards, and bursaries, and greater amounts available for emergency loans and grants.
Increase financial support to graduate students who lack access to external funding.	Increase in funding available to this group.

**11. Promote campus diversity by enhancing accessibility to students from around the world.**

Strategy	Performance Indicator
Engage in targeted marketing to build awareness in select international areas.	Yearly comparison of international (visa) applications. Yearly comparison of international (visa) offers.
Dedicate resources to create a professional and collaborative approach to international student services.	Yearly comparison of international (visa) registrants as a percentage of all registrants. Average number of credit hours completed by visa registrants as compared to non-visa registrants and compared year to year. Yearly comparison of incoming/outgoing exchange students.
Pursue collaboration across faculties and departments at the U of L, and identify collaborative opportunities within the local community and the province.	Number and type of international liaison activities between the International Centre and faculties/departments across campus. Number and type of collaborative efforts externally to enhance international student experiences.

**12. Enhance accessibility for non-traditional students, including adult learners and immigrant and permanent resident learners.**

Strategy	Performance Indicator
Identify and implement appropriate support services for non-traditional student groups.	Targeted support services.

*Sustainability*

In addition to undertaking a campus-wide strategy for sustainability, including extensive stakeholder consultation, the U of L is working towards the following broad sustainability goals and strategies.

**1. Environmental and ecological sustainability will be central to decisions about the design and operation of the University of Lethbridge.**

Strategy	Performance Indicator
Maximize the utilization of existing physical infrastructure.	Amount of outstanding deferred maintenance. Consideration of Campus Space Report in capital planning decision.
Continue to construct to LEED Building standards, while exploring whether formal certification provides greater accountability.	New buildings constructed to LEED Building standards. Consideration of LEED Building standards in preservation projects.
Ensure that procurement follows environmentally sustainable practices.	Clear set of practices developed, whether through policy or guidelines.



**2. University operations will be sustainable by aligning resource decisions with the U of L Strategic Plan.**

Strategy	Performance Indicator
Review the University Budget Process to ensure that it reflects sound financial and resource management.	Resources allocated to activities associated with strategic priorities.
Plan for staff complement, specifically retirements and duplication.	
Ensure that governance bodies and practices follow best practices and the requirements under the Post-Secondary Learning Act.	

**3. Social sustainability will be fostered by ensuring that U of L promotes responsible action in the classroom, laboratory, and community, including access to quality post-secondary education programs.**

Strategy	Performance Indicator
Continue to implement the Academic Quality Assurance Process.	Number of Quality Assurance reviews conducted annually.
Further incorporate sustainability concepts, including environmental sustainability and good citizenship, into curriculum and classroom activities.	

## Community

**1. Continue to connect with the local and provincial community to offer educational, recreational, and cultural opportunities.**

Strategy	Performance Indicator
Offer a broad range of educational, recreational, and fine arts programs to the community.	Attendance at public events. Number of public events. Registration in community programs.
Continue presenting speaker events open to community members.	Attendance at public lectures. Number of public lectures.
Work with community groups to present cultural and social events.	Number of co-presented events.
Develop and implement a communications plan to raise public awareness of the quality and scope of research, scholarship, and creative activity at the University.	Development of communications plan. Annual reporting on progress related to communications plan.
Continue to allow access to University facilities for recreational and cultural programs to community members.	Number of community bookings of University facilities.
In the downtown Penny building, develop and promote publically accessible events and programs, and distribute information about the University to members of the	Number of inquiries / walk-ins at the Penny Building.

Strategy	Performance Indicator
public.	

**2. Develop and maintain collaborative research projects that enhance our response to international, national, provincial, and local community needs.**

Strategy	Performance Indicator
Develop, maintain, and enhance collaborative projects related to family health and wellness that translate science to practice.	Number and scale of collaborative health and wellness projects.
Develop, maintain, and enhance collaborative projects that provide tools and strategies related to environmental sustainability.	Number of users who access the Alberta Terrestrial Imaging Centre's land use management software platform. U of L contributions to the Integrated Resource Management Program. Establishment of a Hyperspectral Development Centre for satellite-borne sensors.
Develop technological platforms for water and land use monitoring.	Availability of new tools for airborne observation.
Investigate the establishment of an Alberta Institute for Epigenetics.	Development of a proposal for the Alberta Institute for Epigenetics.
Continue to work with the Prentice Institute for Global Population and Economy to focus on research and education in long-term economic and demographic trends.	Development and implementation of Prentice Institute strategic plan.
Communicate the output of the Prentice Institute's work to stimulate further research and enable better informed decisions by individuals, governments, and corporations.	Development and implementation of a communications plan to raise awareness of the research and scholarship at the Prentice Institute.

**3. Support and expand the Calgary and Edmonton campuses.**

Strategy	Performance Indicator
Support and expand the Calgary and Edmonton campuses.	Enrolment in Management programs at Calgary and Edmonton campuses.
Foster and renew relationships with Campus Alberta partners.	Number of collaborative programs. Enrolment in collaborative programs.

## 7. Financial and Budget Information

The University of Lethbridge’s Operating Budget for fiscal year 2011-12 is \$151,215,273, an increase of \$850,416 (0.99%) from the previous year. This year’s budget presented a challenge. Reductions are expected for the following three years with the anticipation that the government operating grant will hold constant and that student enrolment will see limited growth. Given the unfavourable fiscal environment, the University has been guided by our Mandate as a Comprehensive Academic and Research Institution and by our Strategic Plan to direct scarce resources to the most impactful priorities.

### *Expected Revenues and Expenses*

The following graph illustrates the annual change in the University’s operating revenue and expenditures in current dollars over the past 15 years.

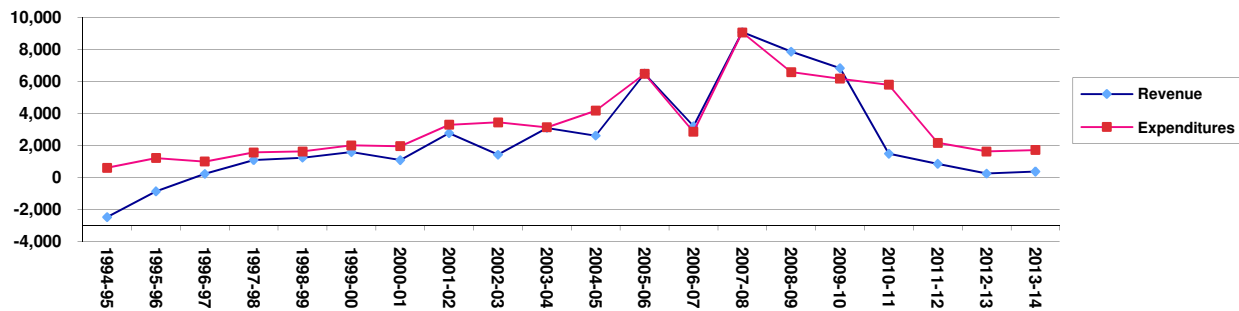


Figure 3: Change in Revenue and Expenditures from Previous Year (\$000), 1996-97 to 2013-14

## *Tuition & Fees*

The Board of Governors formally approved the new fee rates for the 2011-12 fiscal year at their December 2010 meeting. All changes to annual fees and rates charged to students have been reviewed by a Student Fee Review Committee.

In 2007, Advanced Education and Technology introduced the Tuition Fee Policy Guide that rolled tuition fees back to 2004-05 levels and restricted fee increases to the annual average Alberta CPI (using a twelve month period ending in June of each year). In line with this policy, the maximum rate used for the 2011-12 increases is 0.35%. In calculating proposed fees, the increase was rounded to the nearest dollar.

*Table 5: Current and Proposed Instructional Fees (per course)*

	2010-11		2011-12			2012-13		2013-14	
	Actual		Approved	% Inc	Proposed	% Inc	Proposed	% Inc	
<b>Undergraduate</b>									
Canadian	\$ 484	\$	485.50	0.35%	\$ 490	1.0%	\$ 495	1.0%	
Foreign	1,095		1,099	0.35%	1,110	1.0%	1,121	1.0%	
<b>Graduate</b>									
Canadian	568		570	0.35%	576	1.0%	581	1.0%	
Foreign	1,267		1,271	0.35%	1,284	1.0%	1,297	1.0%	
<b>Co-op Fees</b>	592		594	0.35%	600	1.0%	606	1.0%	
<b>Mentorship Fee Mgmt</b>	284		285	0.35%	288	1.0%	291	1.0%	
<b>Master of Education</b>									
Program Fee	335		336	0.35%	339	1.0%	342	1.0%	
Course Fee	568		570	0.35%	576	1.0%	582	1.0%	
Part-time term fee*	1,092		1,096	0.35%	1,107	1.0%	1,118	1.0%	
Full-time term fee*	1,638		1,644	0.35%	1,660	1.0%	1,677	1.0%	
Continuation Fee	546		548	0.35%	553	1.0%	559	1.0%	
<b>Master of Counselling</b>									
Program Fee	525		525	-	525	-	525	-	
Course Fee	1,150		1,150	-	1,150	-	1,150	-	

**Note:** International students in the Master of Education and Master of Counselling programs are assessed tuition fees at a rate of an additional 125% over that of Canadian students.

Fee revenues account for 26.16% of general operating revenue in the 2011-12 operating budget.

## Budget Assumptions

The operating budget for the next three years has been modeled on a number of assumptions. In making these assumptions, University Budget Committee adopted a conservative approach to ensure sufficient resources to provide a balanced budget in the event that the assumptions do not hold true.

<b>BUDGET ASSUMPTIONS</b>			
	<b>2011-12</b>	<b>2012-13</b>	<b>2013-14</b>
<b>REVENUE</b>			
Grant		0.0%	
The government has indicated that post-secondary institutions will not receive increases to government funding over the next few years.			
Instructional fee	0.35%	1.0%	1.0%
Since 2007, fee increases have been restricted to the annual average Alberta CPI (using a 12 month period ending in June each year), with 2004-05 as the base year.			
<b>EXPENDITURES</b>			
<b>Compensation</b>			
Merit		2.5% to 4.0%	
Market		Pool established	
Benefits		5.0%	
The University is in the first year of a three-year agreement (to June 30, 2013) with the University of Lethbridge Faculty Association (ULFA) and the Alberta Union of Public Employees (AUPE) contract is being renegotiated this year (current agreement expiring June 30, 2011). Projections have used the rates set in the existing agreements and estimated increases in years where the agreements are to be renegotiated.			
Contracts	2.4%	1.6%	2.1%
There are no anticipated increases in our software contracts and maintenance for the next three years.			
Utilities	0.0%	0.0%	4.6%
The University signed a four-year electrical agreement commencing in 2011 which has stabilized our electrical prices until 2014. The University buys gas on a two-year basis and any consumption over the contract amount is bought on the free market.			
Insurance		0.0%	
There are no anticipated increase in insurance rates over the next three years.			



## 8. Resource Implications

### *Access and Quality*

#### New Program Development

Several new programs under active development at the U of L will require EPE funding to be implemented:

- Ph.D. in Education.
- Ph.D. in Health.
- Ph.D. programs in social sciences and humanities.
- Master of Health Sciences in Addictions Counselling.
- Master of Nursing.
- Bachelor of Education, Niitsitapi.
- Bachelor of Fine Arts, Major in Fashion Design.
- Bachelor of Fine Arts, Major in Interior Design.
- Bachelor of Health Sciences, Major in Aboriginal Health Studies.
- Accounting Bridging Program (after three years of funding by ICAA).

For those programs that need EPE funding, the U of L may proceed with developing program proposals for internal and external approval, with the understanding that we cannot implement these programs until we receive funding.

Repositioning our current offerings on our Calgary and Edmonton campuses to respond to market demands and transitioning to more accessible, blended learning strategies for adult learners will require a significant investment in new learning technologies and strategies. This may also involve reallocating instructional resources to accommodate a more flexible and accessible delivery format. By partnering with a number of colleges and offering several of the proposed new programs, the U of L will have the scale and technology to offer a general business degree plus majors in high demand areas, enabled by applying blended learning techniques.

#### Graduate Student Expansion

We anticipate that the University will have to increase investment in graduate student recruitment initiatives. Consistent with the Alberta Access Planning Framework, out of province and international recruitment initiatives will be targeted and funding will be requested to support these initiatives.

Current personnel in the Dean's office of the School of Graduate Studies are fully deployed with recruiting students and managing existing programs. An expansion in graduate programming will therefore necessitate additional positions that will focus on developing and implementing out of province and international recruitment strategies. These new positions will work closely with the undergraduate recruitment office and the International Center for Students. Funding for the positions will be required to coincide with the implementation of the new graduate programs identified within this document and will be clearly identified within U of L submissions to future EPE competitions.

Without funding to assist in graduate student recruitment, the U of L will be unable to fully meet its mandate as a Comprehensive Research and Teaching Institution.

## FNMI Initiatives

We have submitted a proposal for funding for FNMI residence spaces, and have developed a framework for collaboration with the people of the Blood Tribe to offer guidance and support. However, effectively dealing with FNMI support needs will require additional funding. A recent presentation from a representative of the Association of Universities and Colleges of Canada emphasized that successful FNMI programming initiatives typically deploy twice the level of support (and thus have twice the support budget) as traditional programs.

## Collaborative Initiatives

Two plus two transfer agreements with postsecondary institutions fall within the normal scope of operations. Aside from the investment in time and travel to negotiate agreements, there should be limited additional resource implications for the University. If these 2+2 initiatives are successful, there may be a need to assign dedicated personnel to negotiate and manage such arrangements, and possibly additional teaching faculty.

## Community Engagement Initiatives

The Community Engagement goals and strategies do not generally have serious implications for U of L resources. The strategies are assumed to be implementable within existing budgets. The collaborative research projects listed assume that adequate research funding must be obtained, through provincial and national research funding competitions and other external funding sources. The Prentice Institute has its own budget, derived from a gift to the University of Lethbridge by John and Constance Prentice.

## *Information Technology*

There is an increasing dependency on technology by all University stakeholders. This requires appropriate facilities such as primary and secondary data centres with backup power and air conditioning to ensure constant access to technology services.

Cyber infrastructure, or technical infrastructure required by researchers, is also growing. The University currently houses a 5.05 Teraflop High Performance Computing (HPC) Cluster for research purposes. We expect to be required to house several similar HPC systems and other cyber infrastructure over the next few years requiring additional data centres or the expansion of existing centres.

Access to these technical services in the data centres requires a robust and redundant network for delivery. The core and secondary networks run essential services such as telephone and security systems. Fibre networks between buildings must be redundant to ensure service is not interrupted. We have installed some redundancy and, as the campus grows, need to add additional redundancy.

Wireless networks are also becoming increasingly important to the University. We need to increase the number of locations where wireless is available, add capacity to existing locations to handle the large number of users, and increase the data transfer speed as new standards are available (i.e. move from 802.11b (11 Mbps) to 802.11g (55 Mbps) to 802.11n (100 Mbps)).

Students are increasingly bringing laptops to campus and thus require access to power in order to charge their batteries. The University is in need of upgrading its infrastructure to allow for more electrical outlets to accommodate the students.

In addition to infrastructure-based information technology challenges, the U of L must also address user-based challenges. Progress continues towards developing IT program consistency throughout the institution as well as shifting from simple technology delivery to IT/business process change, expanding the spectrum and emphasis of service from base infrastructure to look at service improvements and business transformation.

In this budget cycle, IT needs were grouped into three areas: Transformation (initiatives where there are emerging requirements to support new university services and processes); Services (initiatives where core university processes and services need improvements); and Systems (initiatives related to base Information Technology infrastructure). This reflects the role of IT as more than just the infrastructure but as a service and as a catalyst.

Information technology initiatives have all been planned for and prioritized through the internal budgeting process.

### Capital Plan

Each year, the University of Lethbridge updates its Capital Plan. Responding to institutional priorities found in the 2009-2013 Strategic Plan, the Institutional Research Plan, and, until 2010/11, the Institutional Access Plan and Business Plan, the Capital Plan is guided by the principles identified in the Core Campus Expansion Plan. In addition to the University's own plans, the U of L Capital Plan is also aligned with Government of Alberta and the Ministry of Advanced Education and Technology goals and priorities.

Over the past year, two major projects were completed at the University of Lethbridge: Markin Hall and a Daycare Facility. Markin Hall is the new home to the Faculties of Health Sciences and Management. The daycare facility opened in January 2010 with 54 childcare spaces. In addition to these new buildings, the Dr. Foster James Penny Building in downtown Lethbridge saw renovations with a portion of the building now in use.

The additional space in Markin Hall along with the renovation of vacated space in University Hall and Anderson Hall will help alleviate some of the immediate need for new space. However, there continues to be a critical need for offices, labs, classrooms, and residence spaces.

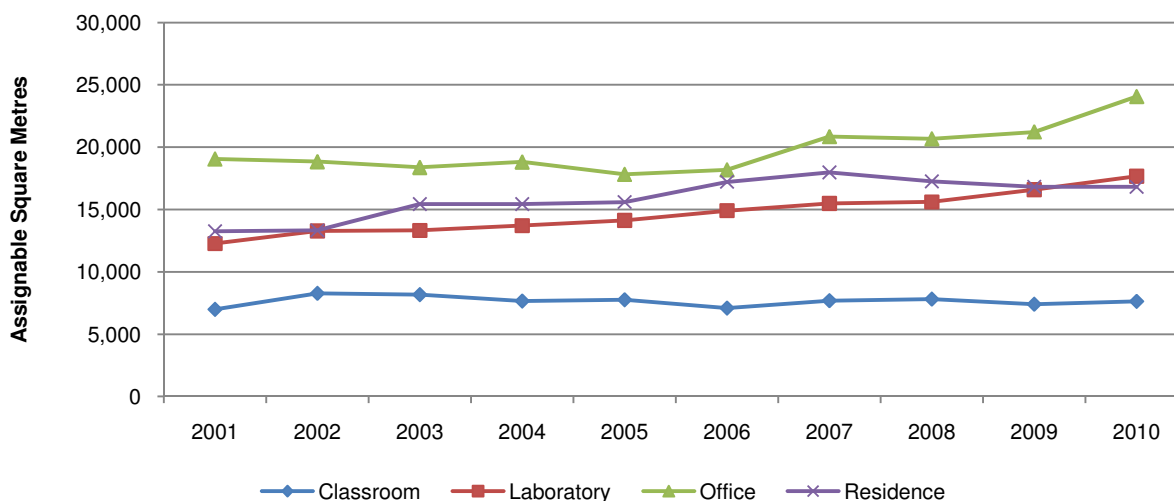


Figure 4: Net Assignable Space by Function (as of August 31 of each year)

The highest capital priority for the University is a new science complex in order to deliver current science programs and to accommodate the University's commitment to research. To continue to excel in research and to further our role as a comprehensive university, the U of L requires new facilities that will provide more dedicated space for these programs and functions. New science facilities would increase capacity by providing space for principal investigators, new graduate and undergraduate students, and technical support personnel. There has been significant discussion on whether to renovate existing space or build new research facilities to meet these needs. In analyzing the preliminary business case for the facility, the identified preferred option would be to construct a new facility.

In addition to the need for new space, the University also needs to maximize existing space. The average age of the 43 buildings on campus is 22.8 years. Deferred maintenance on existing facilities continues to grow and is of great concern for the University. Total deferred maintenance projects currently sit at approximately \$112 million with \$49 million that should be addressed between 2011 and 2014.

It is not enough to build new facilities and to preserve those we have; there are also the costs associated with *using* the facilities. Based on the major capital projects over the next five years (Penny Building, Science Facility, Central Plant Facility, Student Residences, Art Gallery, and an Office/Classroom Complex), \$3 million in lights-on funding will be required to maintain new facilities once they are completed.

### Capital Priorities

The University uses Alberta Infrastructure’s BLIMS system for categorizing capital projects into Preservation, Expansion or New Facilities. The following are the University’s identified priority capital projects, as well as the anticipated timelines.

		Estimated Project Cost (Jan 2011 dollars)	Timeline				
			2011/12	2012/13	2013/14	2014/15	2015/16
<b>Preservation Projects</b>							
1	Science Complex						
	Planning	700,000					
	Science Facility	224,300,000					
	Central Plant Facility & Distribution Systems	30,000,000					
2	Dr. Foster James Penny Building Upgrades	6,200,000					
3	Physical Education Building Upgrades	5,600,000					
4	Tunnel & South Plaza Replacement	3,200,000					
	<b>Total Preservation Projects</b>	<b>270,000,000</b>					
<b>Expansion Projects</b>							
1	Student Residences	25,000,000					
2	Alberta Water & Environmental Sciences Building (Phase 2)	24,000,000					
	<b>Total Expansion Projects</b>	<b>49,000,000</b>					
<b>New Facility Projects</b>							
1	First Nations Gathering Centre	5,000,000					
2	Distributed Learning Centre	1,300,000					
	Office/Classroom/Cultural Centre						
3	Art Gallery	30,000,000					
4	Office/Classroom Complex	75,000,000					
5	Research Transition Facility	10,000,000					
	<b>Total New Facility Projects</b>	<b>121,300,000</b>					
	<b>TOTAL PRIORITY CAPITAL PROJECTS</b>	<b>440,300,000</b>					
<b>Projects in Progress</b>							
1	Deferred Maintenance Projects	12,857,500					
2	CCBN Expansion	1,419,727					
	Student Residences						

3	University Hall (62 beds)	3,476,100		
4	Kainai Apartments (37 beds)	<u>1,823,900</u>	5,300,000	
<b>Total Projects in Progress</b>			<u><u>19,577,227</u></u>	

### Resource Implications

University reserves are set up from time to time through one-time dollars to be used for special purposes. Over the years, reserve balances have fluctuated in relation to the funding of various new building construction projects. The University cannot continue to rely on capital reserves to make up shortfalls in capital budgets.

The University of Lethbridge relies heavily on the Province of Alberta in funding capital projects, but also uses funds from Research Agencies, Fund Raising, and the University's own contributions.

	2011-12 Approved Budget	2012-13 Proposed Budget	2013-14 Proposed Budget	2014-15 Proposed Budget	2015-16 Proposed Budget
<b>SOURCES OF FUNDS</b>					
Major Capital Projects:					
Provincial Government	10,700	141,500	139,100	56,500	26,000
Fund Raising/External Sources			2,500	7,500	5,000
Federal Government	3,920	-	-	-	-
Research Agencies	-	1,000	12,000	11,000	-
University Contributions	14,300	12,000	4,000	-	-
	<u>28,920</u>	<u>154,500</u>	<u>157,600</u>	<u>75,000</u>	<u>31,000</u>
Infrastructure Maintenance (IMP) Grant	5,316	6,000	6,000	6,000	6,000
Advanced Education & Technology	3,396	-	-	-	-
Indirect Research Costs Grant	300	300	300	300	300
University contributions	470	370	370	370	370
University Capital Reserves	5,825	1,780	1,780	1,780	1,780
<b>TOTAL FUNDING</b>	<u><u>\$44,228</u></u>	<u><u>\$162,950</u></u>	<u><u>\$166,050</u></u>	<u><u>\$83,450</u></u>	<u><u>\$39,450</u></u>

University Advancement is working to identify fundraising priorities for projects and funding. Currently, Advancement is developing a five to seven year comprehensive fund development campaign that will be aimed at realizing the Strategic Plan through identified projects and programs. This campaign hopes to engage alumni, faculty, and staff from across the institution, to create an environment to be able to capitalize on major gift prospects, and to find alternate funding models to enhance fund development activities.



## Appendix One: Future Programming

The following programs are concepts for future programming that take advantage of societal and marketplace demand and University expertise. Depending on resourcing, the U of L may move these programs to active development in subsequent CIPs.

<b>PROGRAM</b>	<b>PROJECTED FUNDING SOURCE</b>
<b>Master of Arts (Curatorial Studies)</b>	No govt. funding required for program initiation.
<b>Master of Science (Management), focus in Not-for-Profit</b>	Govt. funding.
<b>Master of Health Management</b>	Govt. funding.
<b>Master of Interactive Arts</b>	Govt. funding.
<b>Master of Science (Mental Health Therapist)</b>	Govt. funding.
<b>Bachelor of Arts, Multidisciplinary Major in Latin American Studies</b>	Govt. funding.
<b>Bachelor of Fine Arts, Major in Native American Art</b>	Govt. funding.
<b>Bachelor of Science, Multidisciplinary Major in Medical Physics</b>	Govt. funding.
<b>Bachelor of Science, Major in Nanoscience</b>	Govt. funding.