

# **INTEGRATED PLANNING: OPERATIONAL GUIDELINES FOR THE FIRST FIVE-YEAR PLAN 2006-07 TO 2010-11**

## **I. Introduction & Context**

Guelph's position as a leading university is the direct result of careful planning. A fine example of this success is the strategic, multi-year effort mounted to respond to the double cohort—an effort which has drawn praise both from within and outside the university sector. We should definitely congratulate ourselves on this performance. But unfortunately, it is not yet time to relax.

We continue to face issues that could prove as challenging in their own way as the double cohort. This is the time to build upon our accomplishments and transform our planning process from one that is merely successful into one that is truly exceptional. The future holds both predictable trends and uncertain commitments. We have done a good job so far in planning our strategy for and response to these developments. As we move forward, we need to do even better, and we need to do so more consistently.

We are not alone in this desire. Many other universities as well as other types of organizations have been recently attempting to improve the coordination and comprehensiveness of their strategic planning efforts. *Integrated planning* is the name generally given to new approaches which emphasize transparency, predictability, accountability, and effectiveness in the planning process.

The introduction of integrated planning at the University of Guelph has the advantage of a fairly well-developed existing planning process. The word 'integrated' has a number of connotations here: most important is that moving to this new planning process does not involve discarding and replacing our current processes, but rather building upon them and more explicitly co-ordinating them into a collaborative and systematic framework which facilitates and encourages

better planning at all levels. There are several key dimensions of integration that we hope to achieve, each of which represents a basic goal of the process:

- Integrating whole-university and specific-unit planning efforts in a coordinated process that allows strategic decision-making to inform and be informed by the particular goals and needs of individual units.
  - *Goal: systematize distributed planning efforts into a well-defined, repeatable procedure.*
- Integrating planning with resource allocation in a more formal way that acknowledges the increasing uncertainty of our primary funding sources, recognizes the need for resource planning, and forestalls the emergence of both unfundable plans and unplanned deficits.
  - *Goal: ensure a match between resource allocations and objectives.*
- Integrating academic and administrative planning, in explicit recognition that effective coordinated execution and delivery in both realms requires that same sort of coordination at the front end.
  - *Goal: ensure that administrative structures are necessary and sufficient to support the academic enterprise.*
- Integration of planning, evaluation, and accountability, to provide more precise and transparent feedback on performance in all areas of endeavour, and to allow plans to reflect accomplishment and encompass efforts toward continuous improvement.
  - *Goal: enhance accountability by measuring and reporting tangible progress and results.*
- Integration of plans over a multi-year time frame, to improve continuity and predictability, and to reduce our dependence on and exposure to short-term fluctuations and constraints.
  - *Goal: focus on longer-term forecasts and effects.*

Our overall goal should be a clear, efficient, and repeatable planning process at all levels, because the challenges those plans are meant to address will only become more daunting. Integrated planning—as a process and an organizational project—is a way to further enhance the ability of the University to confront and control its future.

Integrated planning is not, however, an end in itself, but rather a methodology for more effectively marshalling the University's ever-limited resources toward common goals. While specific themes and parameters may vary from year to year, the University's core mission, its fundamental values, and the strategic directions will emphasize our desire to be a world-renowned academic institution.

This document will provide you with the tools to develop our first Integrated Academic plan that will serve that mission, uphold those values, and take us in those directions. A better-organized plan will of course help us respond in a rational and equitable way to potential funding shortfalls and permit the required flexibility to identify strategic possibilities for investment and retrenchment.

## II. Principles for Planning

Over the past several years, a number of planning exercises have been undertaken relating to budget, to academic planning, research planning, planning for fund-raising and the capital campaign and planning for non-academic units. It is important that this process integrates all of these plans both horizontally so that resource and fund-raising plans support the academic and research plans as well as vertically so that individual unit level plans nest seamlessly into college and university-wide plans.

The following represents key principles for academic, resource, space and research planning.

### II.i Principles for Academic Planning

The fundamental framework for planning at Guelph remains consistent with the themes and values espoused in ***Making Choices*** in 2004. The University is committed to a number of principles rooted in the five strategic directions of the University and the mission statement. These include a commitment to:

- Sustain academic distinctiveness, excellence and this institution's character as a high-quality, mid-size, residential university.
- Maintain our standing as a multi-campus, comprehensive university with a strong commitment to undergraduate and graduate programs
- Maintain a three-year degree option in undergraduate programs.
- Continue an emphasis on small-group experiences in the learning process.
- Intensify the integration of research into undergraduate education.
- Adopt new learning technologies, including the use and promotion of distance education in the delivery of courses and programs.
- Develop the whole student inside and outside the classroom.
- Foster diversity and equity and a strong sense of social conscience within and outside the community.
- Protect independence and autonomy within the spirit of academic and intellectual freedom.
- Be accountable as a publicly funded institution of high quality.

The University will continue to be located on one main and a number of smaller campuses with approximately 18,000 full-time equivalent students at the main

campus, approximately 2,500-3,000 at Guelph-Humber and a further 2,000 students at the regional campuses. At Guelph, it is anticipated that undergraduate enrolment will be divided roughly between one quarter in the BA, one quarter in the BSc, one quarter in BComm and one quarter in the remaining programs (which currently include specialized BSc programs in Agriculture, Engineering, Environmental Science, Technical Science, BASc, DVM, BComp, BLA and the BAS). In keeping with recent trends, it is expected that there will be more than 20,000 registrants in distance education courses and a significant number of these will be students registered in degree programs that are both on-campus or in distant locations.

The Province has announced plans for a major investment in graduate education to meet the increased demand of the double cohort as the flow through into master's studies and to begin building the required capacity to meet the projected demand for additional faculty. Government will provide full funding for a 40% expansion in the number of graduate spaces at Ontario Universities. This represents a both an opportunity and a challenge for the University. While we currently anticipate that the number of graduate students will remain about 15-20% of the total population, we would expect our graduate population to grow by between 500 – 750 spaces over the next five years.

And while there has been no strategic announcement from the government on undergraduate enrolment, we know it is keen on improving the quality of the undergraduate learning experience, as discussed in the Rae report. The government has expressed considerable interest in the NSSE (National Survey of Student Engagement) which is used extensively in the U.S. to measure institutions on a number of indicators related to the undergraduate student experience, including interaction with faculty, opportunities for research involvement, writing assignments, group work, and so on. The University of Guelph has participated for the first time this year in this survey and we are expecting our results by the end of August. This data will help inform programming and curricular enhancements as suggested in the Provost's White Paper on Re-imagining the Undergraduate Learning Experience.

## **II.ii Principles for Resource Planning**

While we applaud Government for their multi-year reinvestment in postsecondary education, we are still awaiting many important details on government policy regarding tuition and quality improvements. Despite this lack of information, it is clear that Government will not be providing inflation relief for Ontario Universities and will expect demonstrated quality improvements in return for additional operating funding.

Fundamental to this process will be the ability of the University to develop a balanced budget each year that includes strategies to address all sources of inflation such as salaries, benefits, utilities and other services; reduce long-term debt; and fund deferred maintenance, renovation, and capital replacement.

Within this context college-level resource plans will be governed by the following principles:

- Creation of a Priority Investment Fund. The fund will be created through a series of year-over-year cuts to departmental budgets and augmented with additional funds from the centre. Details of the PIF can be found in Section V, below.
- Differential allocations across colleges and departments. Allocation of the PIF will be made strategically and not be pro-rated across colleges and departments.
- Focus on the whole economy, including funding from other sources such as student fees, research, and service delivery. Colleges are encouraged to leverage all resources at their disposal to maximize their total economy.

### **II.iii Principles for Space Planning**

Effective space planning will be instrumental in our ability to meet the academic and fiscal challenges facing the university over the next decade. New capital construction including the SuperBuild projects, the OVC redevelopment, and the MacKinnon extension will allow the university to redeploy our current space inventory more effectively over the next several years. Principles for this reallocation of current space will include:

- **Academic Assessment of current and future needs.**  
A full academic assessment will review changes to teaching and research needs including:
  - Current and planned changes to the faculty/researcher complement;
  - Current and planned changes to undergraduate and graduate teaching. Special consideration will be given to the planned expansion of graduate enrolments associated with the Ministry's recent announcement to increase the number of graduate spaces in the Province over the next five years.
  - Planned research projects (e.g. CFI, NSERC, CRC, etc.)
  - Our ability to meet research and teaching obligations associated with the OMAF contract

The assessment will cover all types of space including that controlled by departments as well as space booked centrally, and will examine the type of space required (offices, labs, classrooms, etc.), type of occupants to be accommodated in space, the type of activity to be conducted in the space, and the number of occupants to be accommodated.

➤ **COU Space Standards**

Adoption of a set of space standards is an essential part of sound management and space planning. While standards cannot be applied arbitrarily, a reasonable set of standards can serve as an excellent guide for the evaluation of space. As a first-step, both current and projected space needs should be assessed against the COU Space Standards.<sup>1</sup>

Home-grown standards may be developed through a consultative process recognizing that space is a scarce resource and there are competing needs across both academic and administrative units.

➤ **Efficiency in Design & Use**

The adaptive reuse of space is expected to have a minimal impact on current building structure. To the greatest extent possible, existing spaces will be reused with only minor changes. In most cases, Physical Resources staff will relocate existing furniture and equipment. New purchase of furniture and equipment will only be approved in exceptional circumstances.

Where possible, the number of dedicated areas for temporary users of office space (e.g. research assistants and technical staff) will be reduced. This could be achieved by providing alternatives such as the use of reservable shared desk space or providing access points for laptop users in open plan spaces.

➤ **Basic Barrier-Free Accessibility and Deferred Maintenance**

Barrier-free accessibility will be incorporated into renovations to the building and all deferred maintenance as identified in the facility condition audit report will be addressed. The campus-wide energy retrofit study as it pertains to the building will be used to guide changes to the building electrical, mechanical systems and building fabric (e.g. windows) to improve energy efficiency.

#### **II.iv Principles for Research Planning**

Guelph is one of the most research-intensive universities in Canada and is internationally renowned for its broad spectrum of research. Currently, the university receives more than \$100 million in research funding from a broad range of partners including government agencies and private sector partners.

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<sup>1</sup> The Council of Ontario Universities had developed a methodology to be used as a space and utilization guide. The methodology provides a standard set of space requirements by type of use and by type of user that can be used to compare utilization rates across units and across Universities. For additional information on the COU Space Standards, please contact Michael Kupferschmidt in the Office of Resource Planning & Analysis.

The challenge is to build our current strengths while improving on our weaknesses. The following key principles should govern the development of a long-term research plan:

- Research strengths should where possible be aligned with the University's strategic research plan, and this plan should be regularly reviewed.
- Recognition of the value of interdisciplinary research efforts
- Mechanisms to support research efforts that might lie outside of recognized institutional research strengths but that are important for faculty involved.
- Continued focus of future research on achieving international leadership in strategic areas.
- Balanced approach to university-based research support and support of our researchers in strategic partnerships with government, non-government, and industry organization, including research commercialization opportunities.
- Recognition of the close relationship between research and graduate training, in particular with respect to funding for students, meeting graduate enrolment targets, and student career progression.
- Focus on ensuring that commitments aligned with externally restricted funds that support faculty (e.g. OMAFRA contract, Industrial Research Chairs, Canada Research Chairs, etc.) are being met.

### **III. College Submissions**

Ultimately, a plan is a statement of a unit's direction; a map indicating where the unit is in its field, where it wants and needs to go over the planning period, and the optimum path to be taken on the way there. The plan consists of both goals—what we want to do—and strategies—how we intend to do it. The plan identifies priorities and makes choices about the whole scope and potential scope of its activities.

While the intent of the integrated planning exercise as a whole is to develop a university-wide multi-year plan, this must be accomplished in a series of smaller, intermediate steps.

These guidelines describe the plan at the level of the College. It is absolutely fundamental to this process that each department or unit develop its own plan that describes its place at the university. Deans and Deans' Councils are encouraged to develop a process to incorporate unit-level plans into a College-level plan that is in keeping with their individual practices and cultures.

College plans will include all aspects of university operations, including teaching, research and pay-for-service activities. (e.g. lab services, centre for

psychological services) The scope of the plans should also cover operations both on and off the main campus.

These plans are not meant to be carved in stone. While the plan is intended to cover a five-year time horizon, the plan will be updated yearly to adjust to any changes that may occur over the course of one academic cycle. Major revisions to the plan will occur every fourth year in the cycle.

For example, the first plan will cover the years 2006-07 through 2010-11. The second year and third years of the plan will cover 2007-08 through 2010-11 and 2008-09 through 2010-11, respectively. The fourth year of the planning cycle will constitute an entirely new five year plan from 2009-10 through 2013-14.

Each college submission will include the major components:

- **Vision & Goals.** Each college is encouraged to state its goals and describe how they align broader University-wide mission. This section should include a commentary on its balance between teaching and research along with a ranked set of high level goals for the upcoming year and for the five-year period covered by the plan.
- **Curriculum Plan.** The curriculum plan should provide a critical commentary of its current undergraduate and graduate curriculum along with the details of any planned curriculum reform.
- **Research Plan.** The research plan should provide a commentary of current state of research at the college along with any planned research projects or proposals (e.g. CRC, CFI, OIT/ORDCF/successor body, industry funded). The plan should also identify anticipated needs and expenditures for research activities/facilities such as those associated with animal care, the Advanced Analysis Centre, and other core research infrastructure.
- **Research and teaching activities related to the OMAFRA contract or external funds.** The plan should clearly identify all faculty and staff activities that are linked to obligations under the OMAFRA contract. The contract provides for approximately 100 faculty through transfer of a portion of the contract to the university's MTCU budget, in the understanding that this number of FTEs are committed to the research and teaching (including VCEP) activities that OMAFRA and the agrifood industries want fostered. Deans should work with the AVP (Agrifood and Partnerships) to ensure that they are aware of all faculty within their college who are engaged in work associated with the OMAFRA contract.

Faculty who hold Canada Research Chairs, Industrial Research Chairs, or any other position that is externally funded should also be identified along with any activities for which external deliverables are required and budget forecasts.

Appendix I contains a table that allows for faculty planning associated with OMAF and externally funded activities.

- **Resource Allocation Plan.** The resource allocation plan will consist in two parts. A commentary on the existing resource allocation and series of tables that will provide data a range of resource options. Tables can be found in Appendix I. This plan should include:
  - Staffing Plan (faculty & staff)
  - Capital/Equipment Plan
  - Direct research funding and anticipated revenues from overhead on contract research and from royalties
  - Revenue generated from other sources including Guelph-Humber, Executive Programs, Distance Education, Student Fees etc.
  - College Fundraising Plan

Since we know that the government has no plans to cover inflationary increases, all units will be expected to build into their plans an annual rolling 2% cut, the proceeds of which will go toward meeting the university's annual inflationary costs associated with salaries and benefits.

- **Space Plan.** The space plan will provide the commentary on the current space allocation which will include an academic assessment in accordance with the space principles outlined in Section II.iii and with reference to the COU space standards. The plan should include all space requirements including centrally booked resources and should describe and rank the space projects for the college over the next five years.

Space plans should be developed in consultation with the Director of Planning, Engineering and Construction, the Registrar and the Director of Resource Planning.

#### IV. Timelines for the First Planning Cycle

This first cycle is intended for the academic units. It is the long-term goal that non-academic units will participate in integrated planning, guided by the academic 5-year plan that is developed in this initial cycle.

**May 2005 – August 2005** Consultation with Deans to finalize the planning process – timelines, guidelines and data requirements.

**August 2005** VPAC Annual Planning Meeting: Part I

- Final planning guidelines distributed
- Preliminary RPA data package released. Elements of the data package can be found in Appendix II

**September –  
November 2005**

**Development of the Unit and College Level Academic Plans**

- Through its Deans Council, each College will engage in a collaborative process of its own making that results in an academic plan at the College level that builds upon the plans, the aspirations and the strategic directions of the individual departments/schools within that College. Each College will complete its plan through normal internal consultative processes involving staff, students, and faculty. Both the College and its departments/schools will need to make contact with and seek the participation and advice of other units on which they depend or to which they provide services.
- Completed plans of academic units will be submitted to College or designated Deans.
- The College plan will integrate all of its department/school plans with College-wide objectives to form a comprehensive College-level plan. This will undoubtedly involve iterated feedback to individual units, and choices about strategic reallocation of resources among units within the Colleges: priorities and emphases exist and need to be expressed at the College as well as the unit level.

**December 2005**

**VPAC Annual Planning Meeting: Part II**

- Deans will present their College level plans.
- Plans will be discussed and an Academic & Resource Allocation plan will be developed where all requests for additional funding will be prioritized.

**January –  
February 2006**

**Development of University Plan**

- The Provost will present and defend the Academic Plan through the formal budget planning meetings with SCUP and the Planning Steering Committee (PSC).
- The PSC then begins the process of matching the plan to operative budget constraints, reconciling conflicts, and recognizing opportunities for organizational synergy. While the PSC is clearly a place to resolve lingering mismatches between academic and administrative plans, the intent is for such coordination to take place as much as possible during the development of plans at local levels. PSC will then take a key role in establishing budget priorities.

- Additional consultation with individual Deans and VPAC

**March – April  
2006**

**Approval of the Preliminary Budget**

- University budget to be developed for Approval for the Board.
- Discussion in Board/Senate Committees
- Approval of Budget.

**August 2006**

**Beginning of Year 2 Planning Process.**

- VPAC Annual Planning Meeting: Part I
- Year 2 Planning Guidelines to be released
- Revised Year 2 data package released

**V. Priority Investment Fund & Proposals for University-Level Resources**

It is crucial that the University be able to respond to the ever changing landscape of the post-secondary environment as it is buffeted by complex and shifting demands of students, faculty and staff along with the federal and provincial governments. Essential to this process will be the enhancement of the Priority Investment Fund (PIF) that was established in the 2005-06 budget.

For the inaugural year of this planning process, the PIF will be augmented using new revenues received from the provincial government associated with growth and quality. The total amount allocated to the fund for 2006-07 will be \$2.4 M<sup>2</sup>. In future years, we will look for ways to grow this fund.

Allocations from the fund will be allocated competitively and will be comprised of both one time only and base allocations. Priority will be given to innovative projects that leverage additional funding from other sources and have a demonstrated ability to create transformational change. Project submissions will be encouraged from every college.

The Provost may decide to hold back a portion of the PIF in any given year to be allocated in-year or not at all. The total amount of this hold back will be determined in consultation with the Deans and Vice Presidents at the VPAC Annual Planning Meeting held in December of each year.

At this stage, all units that report to the Provost, with the exception of the Registrarial Services, will participate in the Priority Investment Fund and only

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<sup>2</sup> The amount of the University Enhancement portion of the PIF is contingent upon the University's ability to access new operating funding from the Provincial Government. Allocations from the PIF will depend upon the University and therefore individual units within the University meeting enrolment and quality improvement targets. These targets will be a direct result of the Integrated Planning exercise.

these units will be eligible to submit a proposal to the Fund. Ancillary operations that report up to the Provost will not participate in the PIF.

Proposals for the Priority Investment Fund will include but are not limited to the following three current priority areas:

- **Graduate Enrolment Expansion.** The Province indicated that it will provide full funding for a 40 per cent expansion in the number of graduate spaces over the next five years. While the growth in the number of faculty positions will lead to an expansion of our graduate enterprise, we will not be able to achieve the magnitude of the growth proposed by Government within our current resource base.

All funding will be considered to be base allocations and could be comprised of both operating funding for colleges and units as well as funding to support students (e.g. scholarships, student services, library)

A paper on the graduate planning exercise developed by the Dean of Graduate Studies will be released shortly. Deans, Directors and Chairs are encouraged to develop their proposals in consultation with the Dean of Graduate Studies, the Director of Strategic Enrolment Management and the Director of Resource Planning.

- **Improvement in the Quality of Teaching and the Student Learning Experience.** Government has indicated that it is expecting improvements in the student experience in return for increased funding to Ontario Universities. While we do not have full details of how the Province intends to measure quality improvements, we have been put on notice that it intends to make quality improvements a key facet of its new Multi-year Funding Agreements.

A portion of the PIF will be allocated to projects that can demonstrate the real improvements to the quality of the student experience at the University of Guelph. Deans, Directors and Chairs are encouraged to consult the Associate Vice President (Academic) as they develop proposals under this priority.

- **Positioning for an increasingly competitive environment.** System enrolment demand in recent years has been trending away from our traditional science and agriculture base toward the social sciences and arts. We need to be able to respond to demand shifts of this nature. We also need to stand ready to take advantage of and stimulate new demand in areas of evolving interest. To that end, the University began last year to develop plans that would result in significant changes to the way we deliver education in business, engineering and environmental science. All

of these changes have put additional pressure on an already under-resourced system

Units are encouraged to develop innovative proposals that would enable them to deal with the changing demands on undergraduate teaching. The intent of this priority area is not to simply direct money at what we already know is a growing challenge to the university but to give real consideration to transformational change that will allow us to create, transmit and apply knowledge to improve the social, cultural and economic quality of life of people in Canada and around the world.

## **VI. Evaluation and Performance-Indicators**

Thus far, we have outlined the inputs to an integrated plan. What remains is the outputs. In addition to gaining a better sense of what we are going to do, integrated planning is specifically intended to give us more information about what we did, and especially how well we did it. In developing the plans it is important to know the yardstick against which we will be measured.

In general, there are two primary thrusts to this emphasis on evaluation:

- Performance Indicators: objective measures of achievement identified in the planning process and used to establish well-defined objectives.
- Peer Comparisons: benchmark comparisons of Guelph with an appropriate set of ‘competing’ institutions.

Combining these two forms of evaluation gives us not just a sense of internal strengths and weaknesses, but also a context in which to prioritize areas for improvement. Peer comparisons represent a more rigorous formalization of the “we’re number one” approach to the Maclean’s survey. In particular, we expect to conduct peer comparisons in a more flexible manner, recognizing that the most relevant peer institutions may vary from discipline to discipline and unit to unit.

As noted above, we have extensive experience in identifying performance indicators, but relatively undeveloped capacity in actually applying them and holding units accountable for stated goals. Appropriate metrics will also vary from unit to unit, and may be either quantitative or qualitative. In some cases, annual measurements will suffice—in others, a moving average over multiple years will be more fair and informative. The goal is to use the indicators that offer the best and most useful feedback for real improvement of performance, not just those that are the easiest to implement.

Because the selection of performance indicators is itself part of the negotiated-planning process, units will have an important but non-exclusive say in how they are assessed. A core set of indicators will be developed for all units. These are

described in Appendix III. However, there be other indicators that represent the shared vision for individual units. But this means that units will need to carefully select appropriate indicators and not just report numbers for their own sake.

This integrated planning process is not solely about ends and measurement—we believe that the exercise of this means of planning will in itself help clarify objectives and lead to better overall execution of the academic mission. But operationalizing accountability and establishing rigorous assessment criteria are key goals, and there should be no illusions about the consequences that will flow from unjustified deviations. Integrated plans are not just aspirational statements, or the academic equivalent of campaign promises, but rather form a matrix of clear, firm and therefore mutually supporting commitments made by and for the various components of the University in order to maximize our collective potential and extend our success to new heights.

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## Appendix I

### Planning Templates

1. Staffing and Expenditure Planning Template
2. Space Classification Template
3. Facilities Planning Template
4. Capital Equipment Planning Template
5. Research Planning Template

## Appendix II

### Additional Background Data

#### Campus Admissions and Enrolment Plan

##### Undergraduate Teaching Data:

- Departmental Listings of courses taught with breakout by major program grouping of the students enrolled
- Departmental Listings of courses taught broken out by year level of course
- Undergraduate Instruction: Scheduled Weekly Meet Hours per FTE Faculty
- Average Section Size by year level of the course
- FTE of undergraduate course enrolments taught
- Fall snapshots of enrolment levels in departmental majors by year level of the students and numbers of graduates
- Student faculty ratio: undergraduate only
- Student faculty ratio: graduate and undergraduate

##### Graduate Student Data:

- Time series of graduate enrolment data (broken out by level and eligibility of students)
- Current expectations re: graduate enrolment growth
- Time series of PhD and Masters graduates, and per FTE faculty member

##### Staffing Data:

- Time series of staffing levels by employee level (Faculty versus Staff, RFT versus Contractual)

##### Research Data:

- Summary of research \$ generated by faculty member
- Basic counts of faculty receiving various kinds of research funding
- Basic statistics re: average research funding generated per established FTE position, other measures of research activity of faculty by department.

##### Space Data:

- Space summary data as presented to VPAC by department and with College Summaries

## Appendix III

### Performance Indicators

#### **Summary Statistics**

- Undergraduate Enrolment
- Undergraduate Degrees Granted
- Graduate Enrolment
- Graduate Studies Degrees Granted
- Graduate Enrolment vs. Total enrolment
- Graduate Master/Doctoral
- Graduate supervision
- Staff Complement

#### ***Student Demand & Recruitment***

- Offer Rate, Yield Rate and Acceptance Rates
- Distribution of entering grade averages
- Geographic Distribution of Incoming Students
- First Choice Applicants

#### ***Student Retention & Degree Completion***

- Retention and completion, by entering cohort of full-time students
- Retention and completion, first-entry undergraduate programs
- Retention and time to completion, doctoral programs

#### ***Faculty & Research***

- Research Council Funding
- Government Research Infrastructure Programs (Ontario Government Programs, CFI, CRC)
- Research Revenue
- Research Intensity (Definition at the department level?)
- Faculty Holding Scholarly Honours

#### ***Class Size***

- Number of classes, by size, by year
- Median Class size by year
- Percent of Small Class Experience

#### ***Co-op, Distance & Continuing Education***

- Co-op employment summary
- Distance Education Enrolments
- Part-time degree enrolment trends; non-degree – Open Learning growth

#### ***Utilization of Resources***

- Student to Faculty Ratios
- Central Administrative Costs as percent of Operating Budget
- Space: Actual space (COU formula)
- Facilities condition index

- Faculty and staff turnover rates
- Staff to Faculty ratios

### ***Employment Equity***

- Proportion of women appointed to tenure-stream positions
- Visible minorities appointed to tenure-stream positions
- Administrative staff in Designated Groups to Total
- Faculty counts by gender
- Faculty age distribution

### ***Education Outcomes***

- Employment rates of graduates, two years after graduation
- Students Pursuing Graduate or Professional Education

### ***Student Satisfaction***

- Undergraduate Student satisfaction
- Graduate Student Satisfaction

### ***Student Diversity***

- Proportion born outside Canada
- Proportion of International students
- Proportion of Visible Minorities
- Number of International Students