



The University of Lethbridge

2001 – 2004 Business Plan

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Preface

This document is the University of Lethbridge's Post Secondary Institution Business Plan for 2001-2004, submitted to Alberta Learning as input to the department's business planning and funding allocation processes. It is a comprehensive, strategic planning document that outlines the University's general direction, goals, challenges, and issues for the next four years.

How This Business Plan Is Organized

Section 1.0 **Institutional Context** sets the context for the Business Plan and its goals. This section describes the University's **mandate statement, mission and vision**, and presents an **environmental scan** of the most important opportunities, challenges, and issues facing the institution.

Section 2.0 **Goals & Performance Measures** describes the University's **goals**, the **strategies** and **actions** proposed to achieve them, the expected **outcomes**, and how the goals relate to Alberta government goals. This section also describes a proposed set of **performance measures** for assessing progress.

Section 3.0 **Financial / Budget Information** contains the key **assumptions** behind the University's budget projections, discusses the proposed **revenue and expenditure budgets**, and presents the **budget statements**.

Section 4.0 **Accessibility / Enrolment Plan** presents the University's plan for **enrolment and program expansion**.

Section 5.0 **Capital Projections** discusses the plans for **capital renewal, upgrading, and expansion** projects.

Section 6.0 **Tuition Projections** presents the current, approved, and proposed **instructional fees and tuition fee revenues**.

1.0 Institutional Context

1.1 Mandate Statement

The University of Lethbridge is a Board-governed institution functioning under the *Universities Act* as a member of the system of Alberta universities. It offers instructional programs at the Bachelor's level in the humanities, the social sciences, the natural sciences and mathematics, within its Faculty of Arts and Science. It also awards University certificates, diplomas and undergraduate degrees in Education, Fine Arts, Health Sciences, Management and Nursing. As well, it offers a Master of Education (M.Ed.), Master of Arts (M.A.), Master of Science (M.Sc.) and a special case Doctor of Philosophy (Ph.D.). It stimulates and supports basic research and scholarly activity in all disciplines in which it gives instruction, and conducts certain lines of applied research of special relevance to the region or to the province.

The University offers collaborative programs with various community colleges, including post-diploma degrees in Agricultural Studies, Environmental Science, Fine Arts, Management and Nursing. It encourages, through its Management, Education and Arts and Science Faculties, active development of educational opportunities in Native American Studies for Native American students through off-campus and on-campus programs.

The University of Lethbridge provides non-credit continuing education programs throughout the region. It also supports artists' workshops and in general makes available its cultural programs and facilities as well as its athletic facilities to the wider community in which it is located.

1.2 Mission & Vision

In transmitting and advancing higher learning, the University of Lethbridge endeavors to cultivate human values, intellectual growth, social development, aesthetic sensitivity, personal ethics, and physical well-being.

The University of Lethbridge operates under a strategic framework that guides planning, and provides overall direction for the future. The Board of Governors has set a number of objectives for the University, including the following:

- To enhance learning at all levels of university education, including undergraduate and graduate education.
- To develop and maintain academic and research excellence.
- To recruit and retain excellent faculty.
- To strengthen recruitment and retention of students.
- To be a leader in the use of information technology to expand the capacity to learn.
- To provide a rigorous and stimulating environment for research.
- To enhance the learning environment by improving and maintaining capital facilities.

Each of these objectives has strategies that will allow the University to achieve them, given available resources.

1.3 Environmental Scan

Enrolment Growth

The University of Lethbridge is the first choice for many students across Alberta, and beyond. Over the past four years, University enrolment has increased by about 25%. There were 6410 students enrolled in September 2000, up from 6009 students in fall 1999. Based on current trends and our forecasting model, enrolment is projected to increase to 6850 students in 2001. Internal efficiencies and Access Program funds have allowed us to provide seats for all who wish to attend our institution.

Our strong growth is due to our growing provincial and national reputation. In the past few years, Alberta Learning has approved a number of graduate programs, which have allowed us to enhance our reputation for providing opportunities at both the undergraduate and graduate levels. Although graduate student numbers are modest, they are crucial in attracting and retaining excellent faculty, supporting growth in research programs, and in making us more attractive to prospective students.

Since 1994, our resources have been stretched by a growing number of unfunded students attending the University. The table below shows the number of unfunded FLEs from 1994 to 2000.

	1994	1995	1996	1997	1998	1999	2000
Unfunded FLEs:	423.5	432.1	507.9	548.6	568.3	901.1	1020.6

With an increase in unfunded students, tuition fee revenue increases with no corresponding increase in the base operating budget, due to the 30% tuition fee cap. We anticipate that this will be a continuing challenge.

Increases in enrolment present both opportunity and challenge—the opportunity for the University to grow, and the challenge to accommodate these students effectively. Specific challenges with increased enrolment include:

- Attracting faculty to the University when teaching assignments are typically higher than other institutions.
- Finding adequate space for the students.
- Ensuring library resources are adequate.
- Establishing administrative structures to support additional students.

As enrolment at the University of Lethbridge grows, we will continue to face the opportunities and challenges this growth brings.

Past and future (projected) enrolment numbers are presented in sections 4.1 Enrolment Expansion (page 28) and 4.3 Enrolment Plan 2001 – 2005 (page 31).

Market Developments

The University of Lethbridge is increasingly successful at competing with institutions in Alberta and elsewhere in Canada. Since 1996, the number and proportion of students that originate from southern Alberta has declined. At the same time, the number and proportion of students from Calgary, Edmonton, and elsewhere in Canada has increased. These numbers show how competitive the University has become in the province and the country, but they also present challenges.

Increasing numbers of out of town students put pressure on the University for more residences. The University is sensitive to the private hotel industry in Lethbridge, and so does not compete for summer residence business. This means that financing for new residences must be based on an eight-month revenue operation, which makes it virtually impossible to fund them from their own revenue, assuming full-cost allocations to the residence operations.

On-campus residences, however, are very important to the University for recruitment, and are important for the students, as those students who live on-campus generally have higher academic achievements, and participate more fully in the academic lifestyle.

With more out of town students, costs of recruiting and liaising with prospective students increase. Other post-secondary institutions are expanding their markets in the province by offering programs in sites other than their home campuses, through partnerships with other institutions, or distance education.

Increasing competition for students among post-secondary institutions in Canada will make it more difficult to maintain our market share. Students value smaller classes, a sense of community, more access to faculty, national and international opportunities, state-of-the-art teaching space and laboratories, and access to cutting-edge computer technology. Our success will be as much tied to our ability to recruit and retain good students, as it will be to how well we provide them with knowledge and skills that meet employer expectations.

The Northern Campuses

The University is committed to providing access to degree programs for Albertans. This is especially evident in our Bachelor of Management degrees for post diploma students in Calgary and Edmonton. Over 500 students attend our classes in Management, Arts and Science, and Fine Arts on the SAIT Campus and downtown Edmonton. We are the only University to offer such programs, and they have been especially successful.

This success has, however, resulted in significant demands on administration, faculty and staff resources. The Student Union has also been impacted, as the elected representatives seek to represent students on both the main campus and in Calgary and Edmonton. We are now working to resolve these issues.

Staff Attraction And Retention

Attracting and retaining staff is a challenge, especially with lower starting salaries and higher workloads, compared to other post-secondary institutions. Each year, the institutions with the most competitive compensation packages and research resources grow stronger by recruiting and retaining highly talented and productive people. With the increased pressure from larger institutions that can offer higher compensation, fewer assigned courses, and more investments in research, staff attraction and retention will continue to be an issue.

The specific challenges we face in attracting and retaining staff are:

- Hiring new faculty to meet emerging needs.
- Retaining faculty who are still relatively early in their careers.
- Retaining mid- and late-career faculty with strong academic records, who are urgently needed to guide the development of junior faculty.

Although senior faculty members have salaries comparable to those elsewhere, the median salary for assistant professors at the University of Lethbridge is below the national median. Other universities are actively recruiting new faculty members.

The loss of a faculty member poses at least three problems:

1. The financial and other costs of hiring and establishing a replacement.
2. New hiring is done at market rates that are rapidly increasing.
3. The chance that the replacement will be less experienced and not as well established in their research pursuits than the person being replaced.

In February 2001, Alberta Learning addressed the staff attraction and retention issue by announcing the \$10.5 million Faculty Attraction/Retention Fund, to be shared by the university sector. The University of Lethbridge will receive \$834,656 from this fund. This fund is a significant recognition of this serious issue. It will allow us to compete against other institutions with more attractive compensation packages, and also to address the high workload issue.

Tuition Fee Revenues

Alberta Learning's Tuition Fee Policy has a significant impact on the University of Lethbridge. Instructional fee revenue is the second largest source for the University's general operating revenue budget. The Tuition Fee Policy forbids increases in instructional fees if fee revenue is 30% or more of operating expenditures. However, the Policy considers total tuition revenue, and not tuition revenue per student (*fees per se*). Our unfunded enrolment has increased significantly, thus the University has reached this 30% tuition fee limit. Instructional fees were frozen in 2000-01, and will be held at this level until they fall below 30% of our operating expenditures.

The freezing of our instructional fees has some significant negative effects. As a result of the freeze, we cannot even recover the costs of inflation, even though our fee per course is the

lowest among Alberta universities. The freezing of fees also lowers our ability to offer salaries and other working conditions attractive to high-quality faculty.

The Attraction and Retention Funds have made an important difference in this regard, but not enough to offset lost fees. The University received an amount equal to a fee increase of \$16 per course (or roughly 4%). Other Alberta institutions received a 3% fee increase on top of the same Attraction and Retention Fund amount. We cannot make up the gap in salaries, and we are falling further behind.

The tuition fee cap does not encourage further efficiencies; in fact, it encourages the opposite. Further efficiencies would drive down costs, and increase the fraction of operating expenditures comprised of fees. For example, the University would be better off to reduce unfunded student numbers, and correspondingly increase fees to maintain the same tuition fee revenue (less work, same reward). This is clearly counter to the outcome sought by both the University and Alberta Learning, and has been rejected by the University as a matter of policy. Nevertheless, it shows how a well-intentioned policy can have counter productive consequences.

The University is committed to access and reasonable fees, and we applaud recent moves to provide better support for students. Nevertheless, we feel strongly that the Tuition Fee Policy should be revisited to find an alternative that is free of the negative consequences described here.

Space

Academic And Research Space

Though there are increasing demands on space, the University is experiencing a growing amount of new and renovated building space with the construction of the new Library Information Network Centre (LINC) and Life Sciences buildings.

LINC will alleviate many space issues, end a number of inconveniences for students, and will be a new approach to library technology, serving the campus and the region. The building will house the main collections and serials, and will provide more classroom and study space.

The Life Sciences building will house research in the life sciences. The first phase will provide more than 3716 square metres of space for Psychology and Neuroscience research. This facility is scheduled to open in fall 2001.

These new buildings will also provide vacated old library space (about 5,385 square metres), which can be reused. We are currently analyzing this space to determine the best use. Renovation of this space will likely begin in 2002.

All new building space must be maintained at a level that meets the expectations of occupants, donors, and the public. Consequently, there will be more pressure on the operating budget, as the University must provide maintenance, custodial, utility, and other building support when it opens the new facilities.

General Campus Space

There is an urgent and growing need for general campus space (i.e., space other than academic and research space). Specific needs are recreational space, fitness center space, and student housing. The development of general campus space has not kept pace with other campus development. One-time funding through Access Programs, and the debt absorbed by our institution for the construction of LINC, does not allow us to address this need at the moment.

Campus Master Plan

The University is currently refining the *Campus Master Plan*. This plan, designed by Australian architect John Andrews, provides a long-term template for the placement of buildings and development on campus. The plan includes development principles, recommended building sites, important campus spaces, parking locations, and access points to campus. We are presently reviewing and further developing the planning for the proposed expansion of academic space into the west parking lot.

For more details on space, see section 5.0 **Capital Projections** (page 32).

Research

The University has the opportunity to reinforce its position as one of the leading primarily undergraduate institutions in Canada for research. The University takes pride in being ranked at the top of this group in the Medical/Science grants category, and is committed to developing a more balanced funding approach, and to increasing its success rate with the Social Sciences and Humanities.

The newly funded Canada Research Chairs Program will present a significant challenge to our institution. The Program's funding formula focuses significant new resources on the largest research-intensive universities, further concentrating talented researchers. This program may have negative impacts on the programs of most comprehensive and primarily undergraduate universities, including our institution.

The University of Lethbridge received seven Canada Research Chairs¹; we are committing these Chairs to recruiting new faculty. We have also established an internal chairs program to reward research excellence in the existing faculty.

Technology In Research And Learning

We are committed to being a leader in the effective use of technology in research and learning. The University of Lethbridge is the best-networked institution in Canada, providing high bandwidth Internet access for all students, faculty, and staff. Committing to being a technology leader brings with it tremendous opportunities to expand the University's tradition of excellence in academic achievement, research, and student services. It also brings the challenges and costs of keeping up with the demands of technology.

¹ We were the only primarily undergraduate institution to receive a Canada Research Chair from the Canadian Institutes of Health Research.

The University's technology initiatives include the following:

- Development of partnerships with computer technology organizations, and the development of a technology strategy for teaching and research
- Database development in Field Experience, Student Program Services, and Graduate Studies, which would allow interface between these units and the Registrar's Office.
- Development of online examinations. This initiative would reduce the cost of in-class examinations, and provide more flexible examination hours for students.
- Implementation of Degree Audit software. This project has the potential to reduce workload in the manual degree audit area.
- Electronic access to back issues of scholarly journals, which would reduce the number of interlibrary loan requests, provide for desktop delivery of information, and reduce the costs of stacks maintenance.
- Development of online processes for the Student Records System, Human Resources, Financial Services, and Materials Management.
- Broadband Enabled Lifelong Learning Environment (BELLE)— We are one of the partners in this project, which is funded under the CANARIE Learning Program², and led by Netera Alliance³. The project aims to create a searchable database of multimedia learning materials that can be accessed by adult learners and educators across the country.
- Multimedia Advanced Computational Infrastructure (MACI)— The University is a participant in this high-performance computing system, along with the universities of Alberta, Calgary, and Manitoba. MACI's goal is to establish and maintain an advanced communication and computation infrastructure for researchers in the private sector, university, and government. MACI is currently beginning its third year.
- Western Canadian Research Computing Grid (WestGrid)— The University is a participant in this proposal, which offers a unique opportunity to build a shared integrated research environment. WestGrid is a collection of high-performance computing facilities, data storage facilities, collaborative work sites, networks, and human resources. It integrates the computing needs of eight institutions in Alberta and British Columbia, creating a shared high-performance computing resource. WestGrid is currently in the proposal stage; funding is being sought from the Canadian Foundation for Innovation.

A significant technology-related challenge will be to maintain adequate support for the use of technology in teaching. Currently, our Curriculum Redevelopment Centre supports faculty members in learning how to effectively use technology in teaching. With the discontinuation of the Learning Enhancement Envelope funding, we need a replacement funding source to continue this support effectively.

² The CANARIE Learning Program, a \$25 million shared-cost funding initiative, encourages the development and use of broadband networks in education and training.

³ Netera Alliance is not-for-profit corporation comprised of universities, research institutions, government, and private sector companies. It aims to facilitate the development of advanced information infrastructure in Alberta.

The University of Lethbridge has been very progressive in providing technology to its students. A recent student survey showed that 85% of our students think access to computer technology on campus is exceptional. Our challenge will be to maintain this level of satisfaction, and to keep the University at the forefront of applicable technology.

For information on capital plans related to technology, see **Demand For Technology**, page 32.

Facilities Maintenance

The fiscal demands of facilities maintenance are increasing pressure on our budget. Although the University has the lowest deferred maintenance problem in relation to the other Alberta universities, it is still a large problem for this institution, and is growing daily.

For more details, see **5.1 Renewal And Upgrading**, page 32.

Fundraising

Capital projects, and the need for more space, have challenged the University to seek increased financial support from granting agencies and the community. There is always a great challenge in soliciting donation funds, due to competition from other institutions seeking similar funding.

The University established an Institutional Advancement Office (IAO) in January 2001, to strategically position the University in its development efforts. This office coordinates fundraising, development, alumni relations, communications, and marketing to further the goals, mandate, and mission of the University.

The communications component of the IAO aims to promote the organization internally and externally, so its mission, work, and objectives are more widely understood. This relationship building seeks to attract people, and involve them in the life and activities of the University. It will help ensure that individuals and groups share in the University's accomplishments, and appreciate the value of the institution. The development aspect of the IAO focuses on increasing financial support for the University through gifts and grants from individuals and organizations.

2.0 Goals & Performance Measures

2.1 Goals & Expected Outcomes

Goal: Accessibility

The University of Lethbridge is committed to providing access to quality academic programs for as many qualified students from the secondary school system and college transfer programs as we can accommodate.

Strategies	Actions	Expected Results
<p>Continue to support the growth of the institution through the Access Fund, and increased enrolment in targeted programs.</p>	<p>Increase recruitment efforts to hire more staff. Provide additional funding for supplies and materials, travel, and advertising.</p> <p>Implement the recruitment tracking module in SIS.</p> <p>Continue to build relationships with high schools in primary target areas.</p> <p>Continue to build relationships with colleges for new Access Fund programs, and existing programs.</p> <p>Provide programs and services that will help prospective students in making the University of Lethbridge their institution of choice.</p> <p>Increase the number of inquiries that turn into applications.</p> <p>Continue to develop and apply for quality programs through the Access Fund.</p> <p>Implement student Web and degree audit software for easy access to University services and to make the application process more convenient.</p> <p>Set up a bursary fund to provide amounts of up to \$500 in emergency situations.</p> <p>Set up achievement awards for grade 11 students.</p>	<p>The number of inquiries from those interested in attending the University will increase by 1,000 per year for the next three years.</p> <p>The number of campus events for new applicants will increase.</p> <p>Community visits will increase by five in the next year.</p> <p>Student enrolment will grow to 7500 students over the next five years.</p> <p>The number of new entrance and transfer scholarships will expand in the next three years.</p> <p>Existing Access-funded seats will be filled in identified program areas.</p>
<p>Improve our commitment to support Native education.</p>	<p>The Faculty of Education will work achieve partnerships in educating Aboriginal people, including partnerships with colleges.</p>	<p>The number of Native people participating in Alberta's learning system will grow.</p>



Strategies	Actions	Expected Results
Increase international student enrolment.	<p>Increase the University's contacts and profile in target countries.</p> <p>Continue with current foreign exchange programs, and explore new opportunities.</p> <p>Increase scholarships available for international students.</p>	The number of international students at the University of Lethbridge will increase to reach a target of 7% of total enrolment by 2005.

Related Alberta Government Goals

Goals	How We Support The Goals
<i>Alberta Learning Goal 1: High Quality Learning Opportunities</i>	We are committed to enhancing Albertan's access to quality learning opportunities.
<i>Alberta Learning Goal 4: Effective Working Relationships with Partners</i>	Our close cooperation with colleges in developing 2 + 2 programs helps develop effective partnerships that better meet the learning needs of Albertans. Our work with Native communities to support Native education contributes to the social and economic goals of Alberta.
<i>Alberta Government Goal: The well-being and self-reliance of aboriginal people will be comparable to that of other Albertans.</i>	Our commitment to Native education supports this government goal.

Goal: Academic Excellence

The University of Lethbridge is known nationally as an outstanding primarily undergraduate university. We will continue to be a student-centered institution, committed to offering the best possible programs and services.

Strategies	Actions	Expected Results
<p>Continue to maintain exceptional quality academic programs that meet the needs of students and the community.</p>	<p>Continue to recruit word-class faculty for new and existing academic programs.</p> <p>Provide academic programs that reflect employment trends.</p> <p>Continue to offer comprehensive student-professor interaction and small class sizes, particularly in upper-level courses.</p> <p>Combine innovative teaching and research methods with the effective use of emerging technologies to meet the educational goals of our students.</p> <p>Continue to ensure students have access to the latest technology for academic purposes.</p> <p>Partner with industry to ensure the co-op programs respond to the needs of the labour market.</p> <p>Continue to support high-speed network access for all students.</p> <p>Implement phase 3 of the Multimedia Advanced Computational Infrastructure (MACI) project, known as WestGrid.</p>	<p>The academic units will prepare staffing plans and hire academic staff for new and existing programs.</p> <p>The University will conduct a number of surveys each year to monitor student satisfaction with the University's programs and services.</p> <p>The University will provide students and faculty with the latest in technology for academic purposes.</p> <p>Continuous upgrade of the campus-wide network system, and the expansion of bandwidth for Internet access.</p>
<p>Create diverse opportunities that prepare learners to achieve their goals of work in local and global markets.</p>	<p>Continue to apply the University's principle of liberal arts education.</p> <p>Combine innovative teaching and research methods with the effective use of emerging technologies to offer students a broad range of learning opportunities.</p>	<p>Graduates will be prepared to tackle a diverse range of challenges in the local and global marketplace.</p>



Related Alberta Government Goals

Goals	How We Support The Goals
<i>Alberta Learning Goal 1: High Quality Learning Opportunities</i>	Our tradition of academic excellence ensures a learning system that meets the needs of all learners, society, and the economy.
<i>Alberta Learning Goal 2: Excellence in Learner Achievement</i> <i>Alberta Learning Goal 3: Well Prepared Learners for Lifelong Learning, World of Work and Citizenship</i>	Our student-centred approach and exceptional academic programs contribute to the high quality of Alberta's learning system, help learners achieve high academic standards, and ensures learners are given the tools for lifelong learning, success in the workplace, and effective participation in society.
<i>Alberta Learning Goal 4: Effective Working Relationships with Partners</i>	Our commitment to effective partnerships with industry will contribute to quality learning in Alberta.
<i>Alberta Innovation and Science Goal 1: Alberta has a highly qualified workforce to support innovation and science.</i>	Our focus on academic excellence, using innovative technologies, industry partnerships, world-class faculty, and diverse learning opportunities, will help ensure Alberta's workforce is highly skilled, and ready to support innovation and science.
<i>Alberta Government Goals:</i> <i>Alberta students will excel.</i> <i>Our workforce will be skilled and productive.</i>	Our goal of academic excellence, offering the best possible programs and services, will encourage students to excel in academic achievement, and will help ensure Alberta's workforce is skilled and productive.

Goal: Research Excellence

The University of Lethbridge is committed to excellence in research for students and faculty. We take great pride in being ranked at the top of the primarily undergraduate institutions in the Medical/Science grants category. We will develop a more balanced funding approach, and will increase research support in the Social Sciences and Humanities.

Strategies	Actions	Expected Results
<p>Continue to develop a strong research program, with nationally and internationally renowned researchers and scholars.</p>	<p>Build research partnerships with federal agencies that comprise a significant portion of Lethbridge's scientific community, and also build these partnerships throughout Alberta, by working with the University of Calgary and University of Alberta.</p> <p>Aggressively pursue research infrastructure, personnel support, and research funds through direct provincial government support, Alberta funding programs, and the new Alberta Heritage Foundation for Science and Engineering.</p> <p>Promote the University's researchers and their research programs within government, industry, and the academic community.</p> <p>Establish and fund University of Lethbridge Research Chairs and Canada Research Chairs in the next three-years.</p> <p>Provide specific funds to reduce teaching loads to allow more dedicated research time.</p> <p>Establish a fund to support short-term research assignments, to be awarded through an open competition.</p>	<p>The amount of research activity at the University will double in the next five years.</p> <p>The Life Sciences Building will be completed in June 2001.</p> <p>The teaching assignments of newly hired faculty will be reduced.</p>
<p>Continue to provide research opportunities for our undergraduate students.</p>	<p>Aggressively pursue student research funding through NSERC and AHFMR.</p> <p>Increase funds provided internally for the Chinook Summer Research Awards.</p> <p>Offer graduate teaching assistantships, graduate research fellowships, and graduate research assistantships.</p>	<p>Our reputation as a national leader in undergraduate involvement in research will be maintained and enhanced.</p>



Related Alberta Government Goals

Goals	How We Support The Goals
<i>Alberta Learning Goal 1: High Quality Learning Opportunities</i>	Our commitment to an excellent research program for both graduate and undergraduate students will enhance the accessibility, quality, and variety of Alberta's learning system.
<i>Alberta Learning Goal 2: Excellence in Learner Achievement</i>	A research program with renowned researchers and scholars will increase the quality of teaching in Alberta's learning system. This will in turn help learners achieve high standards, and will better prepare them for lifelong learning, the workplace, and citizenship.
<i>Alberta Learning Goal 3: Well Prepared Learners for Lifelong Learning, World of Work and Citizenship</i>	
<i>Alberta Learning Goal 4: Effective Working Relationships with Partners</i>	Our pursuit of research partnerships federally and provincially will enhance the innovation and research capacity of Alberta's learning system, and will help build collaboration and consultation into the design, delivery, and evaluation of the system.
<p><i>Alberta Innovation and Science Goals:</i></p> <ol style="list-style-type: none"> <i>1. Alberta has a highly qualified workforce to support innovation and science.</i> <i>2. Alberta has a quality science, research, and information and communications technology infrastructure.</i> <i>3. Alberta has an internationally competitive science and research system.</i> <i>4. In Alberta, there is effective commercialization and adoption of science and technology.</i> 	Our commitment to maintaining, enhancing, and promoting a strong research program will support the goals of Alberta Innovation and Science.

Goal: Community and Public Relations

Building and enhancing a strong university presence in the local and provincial community has always been an important part of the University of Lethbridge philosophy. We will continue to build a strong presence in southern Alberta, and the province as a whole.

Strategies	Actions	Expected Results
<p>Continue to build strong ties with the community.</p>	<p>Offer educational, recreational, and fine arts programs to the community. Continue our annual showcase speaker events, which are open to community members. Expand the University's home page and Web sites as key channels for marketing and community/student relations. Encourage faculty and staff involvement in the community. Continue to build partnerships in the community with the City of Lethbridge, businesses, and other government institutions.</p>	<p>Increased financial support from the community in the form of donations for scholarships and capital projects. Business leaders, scientists, and other members of the community will continue to serve on committees, and as sessional lecturers.</p>

Related Alberta Government Goals

Goals	How We Support The Goals
<p><i>Alberta Learning Goal 1: High Quality Learning Opportunities</i></p>	<p>The University's continuing education programs and showcase speaker events enhance access to learning opportunities. Working with the City of Lethbridge, businesses, and other government institutions helps make our learning systems more diverse, responsive, and flexible.</p>
<p><i>Alberta Learning Goal 3: Well Prepared Learners for Lifelong Learning, World of Work and Citizenship</i></p>	<p>Offering educational, recreational, and fine arts programs to the public will encourage lifelong learning, and help provide skills necessary for the workplace and effective citizenship.</p>
<p><i>Alberta Learning Goal 4: Effective Working Relationships with Partners</i></p>	<p>Our commitment to maintaining and enhancing our ties to the community will help build partnerships that effectively meet the learning needs of Albertans.</p>

Goal: Student Services

The University of Lethbridge will identify the needs of students and employers when developing student services, and respond to student and community concerns and requirements whenever possible.

Strategies	Actions	Expected Results
<p>Provide students with the ability to access information resources, and adapt to technological change.</p>	<p>Construction of LINC, the new library facility. Continue to improve and expand the Technology Access Program. Maintain excellence in our library system by moving selectively toward electronic-based library materials, preserving our current holdings, and adding appropriate new print materials. Increase electronic access to scholarly journals.</p>	<p>Improved access to information. Better integration of technology to enhance learning in academic and research programs.</p>
<p>Identify and update services required by students (defined as from prospective students to alumni).</p>	<p>Continue with our ongoing program of externally managed and internal student surveys. Provide one-time and continuing funds to allow the initiation and maintenance of new student services identified in the student surveys.</p>	<p>Improved satisfaction ratings on surveys. Improved services to current and prospective students.</p>
<p>Provide students with “anytime, anywhere” access to student services, wherever appropriate.</p>	<p>Increase services supported by voice response technology and the Web. Automate routine tasks, allowing staff to work directly with students on complex and unique student issues. Ensure continuing access to recreational and cultural facilities (e.g., fitness centre, health centre, fine arts performances, art gallery).</p>	<p>Provide the following services electronically in the next three years: - Automated tracking of student applications for admission. - Web-based individual student final exam schedules. - On-line advising and program audit. Automate support for front-line services in the areas of scholarship, student finance, and recruitment. Begin planning for automated degree auditing.</p>

Related Alberta Government Goals

Goals	How We Support The Goals
<p><i>Alberta Learning Goal 1: High Quality Learning Opportunities</i></p>	<p>Enhancing our student services will increase the flexibility and responsiveness of the learning system.</p>

Goal: Facilities And Equipment Renewal

Expand and upgrade academic, research, and support facilities to sustain enrolment growth. Address essential infrastructure and building renewal needs, based on available opportunities and resources.

Strategies	Actions	Expected Results
<p>Address the increased demand for post-secondary education by ensuring that the proper facilities, equipment, and infrastructure are available when required.</p>	<p>Develop and continually update the Campus Master Plan to guide future development of the campus. Identify and prioritize new building projects and building renewal projects on an annual basis, as part of the three-year capital budget process. Continue to prioritize and fund academic equipment renewal as part of the three-year capital budget process. Continue to perform life cycle costing of new buildings and systems, and set up plans to fund on an annual basis. Continue to provide the most up-to-date technology for students in laboratories and classrooms. Ensure future building life cycle costs are minimized when planning and designing building projects.</p>	<p>The opening of LINC in fall 2001 will provide additional space for classrooms, study, and the library collection currently in storage. The opening of the Life Science Building in Spring 2001 will increase our research capacity. The University will produce plans to increase student residences, and will coordinate space requirements with new Access programs currently being applied for. Vacated library space will be renovated for use as classrooms, laboratories, and offices.</p>

Related Alberta Government Goals

Goals	How We Support The Goals
<p><i>Alberta Learning Goal 1: High Quality Learning Opportunities</i> <i>Alberta Learning Goal 2: Excellence in Learner Achievement</i> <i>Alberta Learning Goal 3: Well Prepared Learners for Lifelong Learning, World of Work and Citizenship</i> <i>Alberta Infrastructure Goal 2: Enhance Integrated Infrastructure Planning.</i></p>	<p>Expanding and upgrading our facilities and equipment will help ensure that:</p> <ul style="list-style-type: none"> • Our learning system will more effectively meet the needs of learners. • Instruction is of a consistently high quality, pushing students to higher levels of academic achievement. • We equip learners with the tools for lifelong learning, competency in the workplace, and effective citizenship. <p>Our planned approach to providing the proper infrastructure moves us towards integrated infrastructure planning.</p>

Goal: Operate Responsibly And Responsibly

The University of Lethbridge will operate in a manner that is fiscally responsible, forward thinking, and responsive to the needs of students, faculty, government, society, and the economy.

Strategies	Actions	Expected Results
Maintain tuition fees at competitive rates.	Consult with students to achieve tuition fee rates that support quality academic programs. Adhere to Alberta Learning's tuition fee policy.	The high quality of education at the University will continue. The University's budget will be balanced. Educational opportunities at the University will be accessible.
Pursue funding from external sources.	Develop partnerships with industry to provide contracted services that support academic programs. Meet the 2001-02 fundraising objectives set out in the <i>Institutional Advancement 2001/2002 Strategic Plan</i> . Continue with Board of Governor-approved three-year budgets, which approve the current year's budget and give approval in principle for the budget for the next two years.	The University's budget will be balanced. The Office of Institutional Advancement will develop relationships with individuals and organizations to advance the mission of the University.

Related Alberta Government Goals

Goals	How We Support The Goals
<i>Alberta Learning Goal 1: High Quality Learning Opportunities</i>	Our responsible approach to budget and operations will ensure the learning system meets the needs of learners, society and the economy, and is accessible to all Albertans.

2.2 Performance Measures

Performance measures are used to assess progress related to the University's goals, strategies, and expected outcomes. This section describes the performance measures that we propose to use to track our progress. Annual reports will show actual data that tracks the progress for each performance measure.

Enrolment The total number of students enrolled at the University of Lethbridge.

Graduate Satisfaction In conjunction with other Alberta universities and university colleges, we conduct surveys of graduates, which include rating how satisfied graduates are with the education they received at the University of Lethbridge. We will use this data to assess our progress related to the Academic Excellence and Student Services goals.

Graduate Employment Rates This performance measure tracks how well the University of Lethbridge graduates fare in the workforce. Data will show the percentage of graduates employed, and the percentage of graduates that are employed in jobs related to their degrees. Graduate employment rates will be useful in measuring the success of its strategies and actions under the Academic Excellence and Research Excellence goals.

Administration Expenditures Administration expenditures as a percentage of total expenditures less ancillary expenditures will be a useful measure of the efficiency of the University of Lethbridge administration. We will compare performance on this measure to similar-sized universities, using data collected by the Canadian Association of University Business Officers.

Research Activity The University of Lethbridge is committed to being a leader in research. To gauge progress in this area, we propose the following performance measures:

- **Citation Index:** The number of times research studies at the University are referenced in publications.
- **Research Intensity:** The value of research grants brought into the University.
- **Research Impact:** How well the University attracts research money from community and industry sources.
- **Research Council Success Rates:** The success of applications to the Social Sciences and Humanities Research Council, Natural Sciences and Engineering Research Council, and Alberta Heritage Fund and Medical Research Council.

3.0 Financial / Budget Information

The University of Lethbridge takes its fiscal responsibility seriously. The University's three-year general operating fund budget for the years 2001-02, 2002-03, and 2003-04 are balanced. Funds provided by Alberta Learning in 2001-02 are higher than in previous years; this will allow us to balance the budget with instructional fees frozen at the 2000-01 levels. However, after 2001-02 we will again be challenged to provide the resources required for quality instruction and academic support for our students.

The additional funds provided by Alberta Learning have allowed us to address a major issue: equity funding due to the significant enrollment growth in the institution. The University has a unique allocation of budget monies, where the faculties and schools are allocated tuition fee revenues based on the credit hours they teach. This budget model has proven very successful. It gives the Deans more control over their budgets, allowing them to make good fiscal decisions. As with all models, it is prudent to review its processes and assumptions periodically, and in the spring of 2000 we created a Budget Task Force to review the allocation of resources in the institution. Based on the findings of the Budget Task Force, we refined the budget model by reallocating grant revenues to the faculties and schools to address some of the inequities from climbing enrolment. Section 3.4 (page 25) presents the actual budget statements.

3.1 Key Assumptions For Budget Projections

The operating budget for the next three years has been modeled using key assumptions, involving both revenue and expenditure adjustments. The University has taken a conservative approach to ensure that any changes to the assumptions will still allow for a balanced budget.

Budget Assumptions

	2001-02	2002-03	2003-04
Revenue			
Grant Increase	5.40%	3.00%	2.00%
System award			
Faculty attraction and retention			
Progress award			
Research award			
Unfunded enrollment growth			
Post-secondary equalization			
Utility rebates			
Instructional Fee Increase	0.00%	0.00%	0.00%
Expenditures			
Compensation			
Merit	~3.30%	~3.30%	~3.30%
Market	Pool established	Pool established	Pool established
Benefits increases	5.00%	5.00%	5.00%
Utilities	12.40%	4.20%	5.60%

3.2 Proposed Revenue Budget

The University's overall general fund revenue budget will increase by \$2.77 million in the next year. The proposed budget estimates are realistic and attainable, although there is little room for unexpected revenue swings other than minor fluctuations. Past experience has shown that, annually, budgeted revenue has always been below actual booked revenue.

Alberta Learning has provided additional continuing funds for post secondary institutions to recognize the need to invest in the education of Albertans. The projected budget reflects these initiatives.

3.3 Proposed Expenditure Budget

As in previous years, the growth of our expenditures has outpaced the growth in our revenues. Even with an increase in unrestricted government grants of more than 5%, the requirement to freeze our instructional fee rates may place our institution in a difficult budgetary situation over the next three years.

Compensation Costs

The largest part of the University's budget is compensation costs, which comprise approximately 75% of the total. The Board of Governors has made compensation a priority, due to several years of modest or no salary increases, coupled with increased market pressures.

Alberta Learning has recognized the problems associated with attracting and retaining faculty, and has provided special funding to address this problem. This will give the University some flexibility as it enters negotiations this year. University decisions on the use of this funding will be made on the basis of market and merit criteria, while remaining respectful of the collective bargaining process.

Fixed Costs

While modest this year, fixed costs continue to escalate, and are a factor in the development of this year's operating budget. We have set aside funds for projected cost increases, and to provide for rate increases in the utility budget for facilities.

Scholarships And Bursaries

The ever-increasing cost of post-secondary education makes it difficult for students to complete their degrees without some debt. The University has seen significant increases in the demand for emergency bursaries in the past few years, and has set aside monies on a one-time basis to provide bursary amounts up to \$500 in emergency situations. We have also initiated achievement awards for Grade 11 students, which parallel the Alexander Rutherford Scholarships for high school achievements. The Government of Alberta initiative to reduce

student debt by providing money for scholarships, featured in the recent budget announcement, will help the University attract excellent students, and so is a very welcome move.

Library

The demand for, and cost of, information resources continues to increase. The University has set aside one-time funds to the library acquisitions budget to help offset the continuing costs of maintaining the collection.

Technology

Technology is becoming an important aspect of University life, and it is important to ensure funds are allocated to provide the tools and expertise to make operations more efficient and effective.

See **Technology In Research And Learning** (page 8) for specific technology initiatives.

3.4 Budget Statements

Operating Budget—Expense

	1999-2000 Actual	2000-2001 Budget	2000-2001 Preliminary Actual	2001-2002 Budget	2002-2003 Projected Budget	2003-2004 Projected Budget
REVENUE						
Grants	34,268,592	33,210,000	37,466,494	36,497,590	37,228,790	37,974,490
Tuition and related fees	20,633,050	18,930,000	22,499,283	19,299,600	20,000,000	21,000,000
Sales of services and products	2,956,377	1,463,000	3,744,673	1,538,160	1,600,000	1,600,000
Miscellaneous	1,392,227	308,000	1,488,916	960,765	1,000,000	1,000,000
Investment income	1,049,817	1,355,000	3,721,320	1,355,000	1,355,000	1,355,000
Gifts and donations	18,690	-	10,856	-	-	-
Amortization of deferred capital contributions	4,510,742	6,628,000	4,563,943	6,628,000	6,600,000	6,930,000
	64,829,495	61,894,000	73,495,485	66,279,115	67,783,790	69,859,490
EXPENSE						
Salaries and employee benefits	42,948,306	42,112,000	45,769,820	44,439,000	46,933,300	49,595,500
Scholarships and bursaries	754,207	541,000	814,794	592,000	650,000	682,500
Supplies and services	5,838,722	3,678,000	5,911,978	3,714,000	3,899,700	4,094,685
Cost of goods sold	180,887	155,000	180,244	195,000	204,750	215,000
Travel	1,192,064	721,000	1,287,433	750,000	787,500	826,875
External contracted services	1,022,875	845,000	1,054,117	967,000	1,015,350	1,066,000
Utilities	1,320,375	1,556,000	2,114,623	2,200,000	2,273,000	2,375,600
Professional fees	418,889	271,000	242,485	299,000	300,000	315,000
Interest on long term liabilities	198,642	250,000	403,187	250,000	250,000	250,000
Insurance	132,174	105,000	140,264	105,000	110,250	115,000
Property taxes		1,000	5,868	1,000	1,050	1,100
Loss on disposal of capital assets	74,004				-	-
Provisions		3,809,000		3,938,115	2,558,890	1,522,230
Amortization of capital assets	7,674,175	7,850,000	8,370,221	8,829,000	8,800,000	8,800,000
	61,755,320	61,894,000	66,295,034	66,279,115	67,783,790	69,859,490
EXCESS OF REVENUE OVER EXPENSE	3,074,175	-	7,200,451	-	-	-

Operating Budget—Program

	1999-2000 Actual		2000-2001 Preliminary Actual	2001-2002 Budget	2002-2003 Projected Budget	2003-2004 Projected Budget
REVENUE						
Grants	34,268,592	33,210,000	37,466,494	36,497,590	37,228,790	37,974,490
Tuition and related fees	20,633,050	18,930,000	22,499,283	19,299,600	20,000,000	21,000,000
Sales of services and products	2,956,377	1,463,000	3,744,673	1,538,160	1,600,000	1,600,000
Miscellaneous	1,392,227	308,000	1,488,916	960,765	1,000,000	1,000,000
Investment income	1,225,376	1,355,000	3,908,152	1,355,000	1,355,000	1,355,000
Gifts and donations	18,690	-	10,856	-	-	-
Amortization of deferred capital contributions	4,510,742	6,628,000	4,563,943	6,628,000	6,600,000	6,930,000
	65,005,054		73,682,317	66,279,115	67,783,790	69,859,490
EXPENDITURES		61,894,000				
Academic Units						
Arts and Science	17,296,076	17,314,209	18,735,021	18,346,181	18,796,480	19,360,374
Education	5,304,876	5,832,633	5,483,183	6,019,573	6,167,320	6,352,340
Management	6,060,636	6,458,843	5,931,262	6,724,862	6,889,921	7,096,618
Fine Arts	4,149,424	3,833,824	4,902,862	4,080,516	4,180,671	4,306,091
Health Sciences	1,109,145	984,818	1,217,144	1,058,051	1,084,020	1,116,541
Library	2,968,216	2,500,938	3,485,959	2,740,165	2,807,421	2,891,644
Library - Acquisitions	771,746	937,475	825,778	949,080	972,374	1,001,546
Faculty Travel	103,090	112,766	130,215	102,600	102,600	102,600
Study Leave Removal Fund	47,660	38,468	35,000	35,000	35,000	35,000
Research Grants	77,064	113,975	103,700	103,700	103,700	103,700
MA/MSc	72,825	107,271	32,282	101,895	104,396	107,527
Graduate Studies	-	-	235,426	-	-	-
Faculty Retention	-	-	-	834,655	834,655	834,655
	37,960,759	38,235,219	41,117,831	41,096,277	42,078,557	43,308,635
Support Units						
Office of the President	504,308	539,303	549,757	570,927	584,940	602,488
Board of Governors	68,219	69,244	61,299	76,414	78,290	80,638
Senate	67,690	69,692	76,521	76,292	78,164	80,509
General Faculties Council	27,512	33,479	28,378	34,699	35,551	36,617
Institutional Advancement	434,054	434,880	407,119	495,258	507,414	522,636
Vice President (Academic)	532,165	557,862	643,928	611,573	626,584	645,381
Institutional Analysis	161,192	184,135	152,286	188,412	193,036	198,827
Language Centre	304,245	527,873	248,135	411,695	421,800	434,454
International Affairs	264,861	259,318	158,335	246,644	252,698	260,279
Financial Aid and Awards - Scholarships	643,424	634,119	614,424	658,712	674,880	695,126
ROSS	2,678,503	2,968,029	2,945,123	2,867,457	2,937,837	3,025,972
Research Services	255,649	217,658	325,758	256,931	263,237	271,135
Vice President (Administration & Finance)	131,243	145,215	179,102	216,218	221,525	228,171
Financial Planning	205,827	239,729	274,009	347,248	355,771	366,444
Interdepartmental - Ancillary	395,600	470,389	420,600	420,600	420,600	420,600
Internal Audit	55,222	62,752	59,263	65,198	66,798	68,802
Information Technology	3,509,015	2,255,098	4,326,726	2,706,745	2,773,181	2,856,377
Financial Services	1,109,984	1,227,165	1,126,794	946,114	969,336	998,416
Art Gallery	207,753	188,256	217,461	179,471	183,876	189,393
Material Management	617,595	694,567	628,545	694,708	711,759	733,112
Physical Plant	6,426,278	6,008,226	4,370,015	6,180,957	6,332,666	6,522,646
Utilities	1,204,995	1,740,170	3,217,577	1,779,391	1,823,065	1,877,757
Human Resources	842,187	928,324	899,600	1,009,382	1,034,157	1,065,181
Contingencies	529,103	1,435,112	644,565	2,360,153	2,332,700	2,489,764
Central Administration	2,793,492	1,768,185	2,788,716	1,781,638	1,825,368	1,880,129
	23,970,118	23,658,781	25,364,037	25,182,838	25,705,233	26,550,855
	61,930,877	61,894,000	66,481,868	66,279,115	67,783,790	69,859,490
NET	3,074,177	(0)	7,200,449	0	(0)	(0)

Statement Of Cash Flows

	1999-2000 Actual	2000-2001 Preliminary Actual	2001-2002 Budget
CASH PROVIDED BY (USED IN) OPERATING ACTIVITIES:			
Excess of revenue over expense	4,873,700	8,567,746	-
Non-cash transactions			
Amortization of deferred capital contributions	(4,510,742)	(4,563,935)	(6,628,000)
Amortization of capital assets	7,792,366	8,482,969	8,829,000
Loss on disposal of capital assets	60,230	15,301	-
Increase in accrued liabilities	131,468	651,126	200,000
Decrease in unfunded staff benefits	(785,771)	(844,656)	(500,000)
Increase (decrease) in non-cash operating working capital	(1,175,092)	6,317,866	(5,000,000)
	6,386,159	18,626,418	(3,099,000)
CASH PROVIDED BY (USED IN) INVESTING ACTIVITIES:			
Deposit on capital equipment	-	(550,000)	550,000
Purchase of investments (net)	(2,949,214)	(1,866,827)	5,000,000
Capital asset additions			
Internally funded	(9,091,573)	(13,921,671)	(7,431,793)
Externally funded	(8,858,538)	(17,745,350)	(7,971,756)
Collection additions	(2,523,077)	(1,537,592)	(1,500,000)
Proceeds on disposal of capital assets	40,649	139,672	-
Proceeds on disposal of collection	-	-	-
	(23,381,753)	(35,481,768)	(11,353,549)
CASH PROVIDED BY (USED IN) FINANCING ACTIVITIES:			
Capital contributions received	15,901,615	13,185,583	6,431,793
Special purpose capital contributions	2,784,145	1,336,087	1,000,000
Endowment contributions received	147,857	120,216	100,000
Long term debt proceeds	-	7,100,000	2,900,000
Long term debt repayments	(191,741)	(204,359)	(268,306)
	18,641,876	21,537,527	10,163,487
INCREASE IN CASH AND CASH EQUIVALENTS	1,646,282	4,682,177	(4,289,062)
CASH AND CASH EQUIVALENTS, beginning of year	3,861,430	5,507,712	10,189,889
CASH AND CASH EQUIVALENTS, end of year	5,507,712	10,189,889	5,900,827

4.0 Accessibility / Enrolment Plan

4.1 Enrolment Expansion

For the seventh consecutive year, the University of Lethbridge has reached record enrolment levels. The fall 2000 enrolment exceeded the 1999 level by about 8%, evidence that the University's planned program changes are sound, and are attractive to prospective students. It also reflects the University's commitment to meeting the increasing provincial demand for post-secondary education.

Credit Program Enrolments 1995 – 2000

	1995	1996	1997	1998	1999	2000
Headcount	4909	5160	5361	5432	6009	6410
FLE	4166	4357	4534	4746	5123	5465
% Annual Change	2.1%	5.1%	3.9%	1.3%	10.6%	6.7%

Projected Enrolment Expansion

Present projections indicate a student enrolment level of approximately 6850 in fall 2001, with an annual growth of approximately 400 enrolments across all programs. At the present rate of growth, if funding were provided to sustain it, the University would reach an enrolment plateau of roughly 7500 (6340 FLE) by 2004-05.

Details on projected enrolment expansion by program are discussed in the next section.

4.2 Program Expansion

To build on our increasingly successful program array, we propose expansions in the University's high-demand undergraduate programs of Management (BMgt), Multimedia (BFA), and Addictions Counselling (BHSc). These proposed expansions derive from clear evidence of unmet market demand.

Program Expansion Summary

Group	Cohort Size	FLEs by Fiscal year			
		2002/03	2003/04	2004/05	Continuing
Management					
General expansion	67	67	134	200	225
Fine Arts					
Multimedia	25	25	50	75	100
Health Sciences					
Addictions Counselling	20	20	40	60	80
Nursing	25	25	50	50	50
Graduate Studies					
Special Case Ph.D.	9	9	18	27	40
Masters	20	20	40	40	40
Total enrolment increase:		166	332	452	535
Total increase in FLE:		166	332	452	535
Number of graduates:		0	50	50	166

Management (BMgt)

The proposed undergraduate enrolment increase for the Bachelor of Management program is the result of increased interest from students. The Faculty of Management has proven to be highly successful, with its focus on technology in the Access programs.

Multimedia (BFA)

This expansion will focus on admitting students through direct entry to this four-year program, which meets increasing employer demands. The program combines technical skills in multimedia with a broad education in music, visual arts, and drama. The intent is to create professionals capable of applying creativity and the arts to communications and information technology. Employers favour well-rounded, arts-based training, rather than training focusing primarily on software. The University of Lethbridge's Multimedia Program meets this need with its 13 core multimedia courses, taught by individuals experienced in the performing and graphic arts.

There is considerable demand for this type of program, from both employers and potential students. Currently, 27 agencies specialize in seeking talented people in multimedia, and at least 54 Canadian companies employ people primarily in computer graphics. In 2000, there were 3 applications for every available seat in our Multimedia program. Our multimedia program simply cannot meet the demand at its present funded capacity.

At the requested rate of 25 FLEs annually, beginning in fall 2002, the program will reach a continuing population of 100 additional FLEs by fall 2005.

Addictions Counseling (BHSc)

The proposed increase in this program will meet growing demand, stabilize the program by allowing it to grow to an efficient size, and build the program's record and reputation.

The growth will also allow this program to mature and increase its quality. As the program is unique in Canada, it is attracting students from other provinces. Presently, the program is benefiting from the experience of the first student cohorts in the classroom and in work placements. The first graduates have done well in the job market, and the expansion of the program will increase its stability, responsiveness to graduate demand, and reputation.

Nursing (BN)

The proposed increase for the baccalaureate program in Nursing is designed to meet a forecasted shortage of nurses, and heightened interest in the program. Current market projections suggest a major shortage of qualified nurses is imminent. The shortfall in Canada is expected to be as much as 113,000 over the next decade, which suggests a shortage of about 11,000 in Alberta.⁴

Rising interest in our Nursing program from students in southern Alberta has resulted in three applicants for every available position. A growing 18-24 year old population, and the highest proportion of seniors in Alberta, suggests that student and employer demand will continue to increase in the region.

Special Case PhD

Our doctoral program will be limited to the focus areas from the University's Strategic Research Plan. The first areas of implementation will be neuroscience, biotechnology, and information science. The current proposal is for a Special Case PhD program, with permission to admit a maximum of nine students per year, to a maximum of 40 students at any one time across all approved research areas.

⁴ The number of RNS currently in Alberta is slightly less than 10% of the national total

Masters

The University of Lethbridge proposes to increase the number of graduate students in the Med, MA, and MSc programs by 20, beginning in September 2002. By 2004-05, these programs will reach a steady state of 40 students.

While the University of Lethbridge remains committed to being primarily an undergraduate institution, the MEd, MA, and MSc programs have helped the University recruit and retain excellent faculty, and maintain research productivity.

Increased opportunities for graduate studies bring benefits to both faculty members and students. Faculty members who hope to compete effectively for funds must have access to graduate students.⁵ Also, the students bring energy and new ideas to the faculty. In some areas, students can study at the doctoral level with professors who are among world leaders in their fields. Recent research reported by Statistics Canada shows that Masters graduates earn 25% more than baccalaureate graduates, and have lower unemployment rates.⁶

4.3 Enrolment Plan 2001 – 2005

The table below shows the projected enrolment numbers for 2001 to 2005. These projections are based on a flow-through forecasting model. This model assumes the University meets its target student intakes of 900 new high school and 1100 transfer students.

Year:	Projected Enrolment:
2001	6850
2002	7100
2003	7200
2004	7275
2005	7500

⁵ Federal granting councils emphasize the importance of training highly qualified personnel.

⁶ *Education Quarterly Review*. Vol. 7, No. 2 (2001).

5.0 Capital Projections

With enrolment levels increasing by an average of 8% each year, the University's main focus has been the ability to address the increased demand for post-secondary education, and the growing student population. The University has worked hard to solidify the administrative structure and academic environment to cope with increased enrolment.

Enrolment growth also brings the on-going critical space issue. Over the last two years, we have added classroom, research, and office space, and a number of construction projects are now in the final stages, including the long-awaited LINC. Although the construction of LINC and the renovation of the vacated library space will alleviate some of the space pressures, we need to address areas like specialized teaching and lab space, student housing, and auxiliary space requirements in recreation, food services, and parking.

5.1 Renewal And Upgrading

The institution's first priorities in renewal and upgrading funding are safety, energy conservation, and life cycle cost issues. The CAUBO Deferred Maintenance Study warned that post-secondary institutions in Canada have a serious problem with the poor conditions of their facilities.

This study shows that the University's Facilities Condition Index (FCI)⁷ for 2000 was 29%, a substantial increase over the 9.0% 1997 figure. A high FCI means that buildings are deteriorating faster than the institution can get funding to maintain them. Ideally, funding for facilities maintenance should be 1.7% of the building replacement costs, which for the University of Lethbridge works out to about \$3.7 million per year. Over the past 12 years, actual funding for facilities maintenance has been \$945,000 per year, which is 25% of the ideal funding levels.

Although the University has been fiscally responsible in ensuring that funds are available in the future to maintain our physical facilities, it has put pressure on our budget, as funds that could have been used for teaching are diverted to facilities maintenance.

Demand For Technology

The demand for increased technology in the classrooms, labs and administration put additional pressures on the University's resources. To remain a leader in the use of technology, the University has a unique and cost-effective approach to replacing computers for teaching and administration functions.

The Technology Access Program (TAP) is a campus-wide program that replaces the central student computer labs with high-end computers every 12 months, without an increase in funding. The program has allowed for bulk purchase of computers. In 1999-2000 it reduced the average acquisition cost of computers by 50%.

⁷ FCI = The accumulated deferred maintenance divided by the current replacement cost.

Vacated Library Space

Upon completion of the LINC facility, the vacated library space will be renovated to provide much needed space for faculty offices, classrooms, and research. A total of \$2.5 million has been set aside to assist in the renovation. However, this will not be enough to complete the refurbishment required. The University is currently setting up a building program to determine how this space will be used, and hopes to begin the renovations in 2002.

The renovations in the vacated library space will create a domino effect for additional renovations, as departments are moved and re-situated in the vacated space. At this time, the cost of these subsequent renovations is unknown.

5.2 Government-Approved Expansion Projects

Library Information Network Centre (LINC)

The \$34 million LINC project will provide 18,766 gross square metres of space, with 12,108 net assignable square metres of new space. Of this, about 1,500 square metres will be new instructional and classroom space. The remaining space will be used for the main collections, study space, and administrative space. LINC is scheduled for completion in fall 2001.

Life Sciences Building Project

The Life Sciences Building project began construction in December 1999, with a completion date of June 2001. This research facility will house our internationally known Behavioural Neuroscience group. The total project budget is \$8 million, funded from significant grants from the Alberta Science Research Authority, Alberta Heritage Foundation for Medical Research, Intellectual Infrastructure Program, and the Canadian Foundation for Innovation.

5.3 Long-Term Projects

The University has identified the following long-term projects as priorities. Each project is critical to the future development of the University. They are all intended for funding by different groups. For example, a particular project might be most suitable for government funding, whereas others are most suitable for funding by users or private donors.

Faculty Of Management Building

The University of Lethbridge's Faculty of Management is growing at an exceptional rate, resulting in an immediate need for new accommodations. The Faculty has had new Access Programs approved, which will expand it by 400 FLEs by 2004. This technology-based program also needs an additional 39 faculty and staff over the next four years. The Faculty has also applied for a MA/MSc program under the Access program, which will increase the Faculty space needs even more. The Faculty is currently housed in space that is not

conducive to teaching and research. A new facility would require 5,700 square metres, at a projected construction cost of \$15 million.

Information Technology Centre Facility

Though the University has proven itself as Canada's top undergraduate research university, there is considerable stress on the campus in providing adequate research space. The proposed Information Technology Centre would accommodate existing faculty, an iCORE chair, post-doctoral fellows, graduate students, technical support, and computer labs. The projected space required for such a facility would be 5,000 square metres, at an estimated cost of \$13 million. On-going operational costs would be \$350,000 per year.

Student Residences

There is an undeniable need for more student residences on campus, due to the increased enrolments and an increasing out-of-town student population. Marketing research indicates overwhelming demand for on-campus housing. There are currently 454 students in residences, approximately 7% of the University's student population, but the University has turned away over 600 applicants for the limited housing spaces available.

The cost of a proposed 100-bed residence is estimated at \$4 million. The relatively high price tag is mostly due to unstable soil conditions, as the site is close to the coulees.

Recreational Cultural / Wellness Centre

The University of Lethbridge is in serious need of additional recreational and cultural facilities to meet the demands of its growing population. The proposed Recreational Centre/Wellness Centre would address this need, and would also provide facilities for one of its research priorities: maintaining wellness in the aged, conducted by the Kinesiology and Education faculties.

The proposed Centre would also provide extra space for the University's Art Gallery, which has an outstanding reputation and recognition in the art community. The Gallery has the largest university collection in Canada, and national and international galleries borrow the artwork. The small size and poor location of the current space severely limits the ability to make the collection available.

Funding required to construct a facility that would address recreational and cultural needs is estimated at \$22 million.

Water Resources Institute

Water is the most strategic issue on southern Alberta, the most intensely-farmed region in Canada. The University has been active in water research for a number of years, through collaborations with other private and public institutions. Water resources are of great importance to our community, and the University is committed to strengthening this area of research. This initiative will increase collaboration with other public and private institutions, and will be a vehicle for more participation by such groups in the future.

A new facility is required to expand the research capacity of water resources. The University proposes that this facility be situated adjacent to the Life Sciences Building.

5.4 Effects Of Capital Plans

The University continues its commitment to meeting the challenge of increased post-secondary demand on the provincial system. Over the next three to five years, the University is prepared to take more than 1,000 additional students, provided that we can get adequate resources to make this expansion feasible. The institution is currently operating at capacity, but the above-mentioned capital projects would accommodate future planned expansion.

To plan effectively and efficiently, the University selects program changes that share infrastructure and expertise as much as possible. The program expansions build on existing programs, which minimizes program development costs and shares infrastructure. Even where additional infrastructure is needed, the expertise gained from the existing programs will help to contain costs. For example, in information technology programs, the University's state-of-the-art network and computer laboratories provide an effective shared resource.

Life Cycle Costs

When planning the expansion of its facilities, the University ensures that life cycle costs of its facilities are kept to a minimum. We think that energy efficiency and ease of maintenance are integral to building planning.

Library Resources

The new library facility will solve many space issues, such as needed collection areas, classrooms, and study space. Unfortunately, it will not address the issue of limited library resources, and the University struggles with the need to commit more dollars to improving the collection in a number of areas, and in trying to keep pace with the impact of inflation and the falling dollar.

Effective Technology

All new instructional space will have an appropriate level of technology, including network access and multimedia instructional capacity. This will support the University's goal of remaining a leader in the effective use of technology in learning and research.

5.6 Capital Budget

	2001-2002 Budget	2002-2003 Budget	2003-2004 Budget
SOURCE OF FUNDS			
Alberta Learning Infrastructure			
Facilities	1,864,381	3,420,000	1,300,000
Equipment	167,179	178,000	340,000
University Contributions	1,810,696	2,444,950	2,000,000
LINC - internally funded	5,621,097	-	-
- externally funded	2,602,681	-	-
Life Sciences Building - externally funded	3,337,515	-	-
	15,403,549	6,042,950	3,640,000
PROPOSED CAPITAL EXPENDITURES			
Capital Maintenance	1,538,250	1,346,500	1,040,000
Facility Upgrade	680,850	2,484,500	2,000,000
Life Safety	62,500	183,000	100,000
Parking and Roads	842,500	567,500	100,000
Energy Conservation	82,000	150,000	100,000
Equipment:			
Arts and Science	161,596	150,000	150,000
Education	30,298	30,000	30,000
Management	65,650	50,000	50,000
Fine Arts	95,612	60,000	60,000
Health Sciences	-	10,000	10,000
Utilities	81,000	-	-
PE Facilities/Aquatics Centre	52,000	-	-
Motor Vehicles	31,000	-	-
Housing	119,000	9,900	-
Telecommunications	-	40,000	-
Support Units	-	177,550	-
Information Technology	-	375,000	-
Printing	-	270,000	-
Bookstore	-	106,000	-
Athletics	-	3,000	-
Classroom Technology	-	30,000	-
LINC	8,223,778	-	-
Life Sciences Building	3,337,515	-	-
TOTAL PROPOSED CAPITAL EXPENDITURES	15,403,549	6,042,950	3,640,000

6.0 Tuition Projections

6.1 Tuition Fees

Instructional fee revenue is the second largest part of the university's general fund revenue budget. For 2001-02, about \$19.3 million is being projected in tuition revenue from all credit and non-credit instructional programs, and from student related fees. Alberta Learning's Tuition Fee Policy restricts increases in instructional fees if fee revenue is 30% of operating expenditures. The University has reached this limit and thus has frozen fees in 2000-01. Instructional fees will be held at this level until such time as instructional fees are no longer 30% of our operating expenditures. We have consulted students in the process of setting tuition fees.

Per Course Instructional Fees

	Current 2000-01	Approved 2001-02	Proposed 2002-03	Proposed 2003-04
Undergraduate	\$347	\$347	\$347	\$347
Graduate	\$422	\$422	\$422	\$422
Materials and Service	\$24	\$24	\$24	\$24

6.2 Tuition Fee Revenues

	Current 2000-2001	Approved 2001-2002	Proposed 2002-2003	Proposed 2003-2004
Projected Tuition Fees	\$ 22,499,283	\$ 19,299,600	\$ 20,000,000	\$ 21,000,000