

Lakehead University—Orillia Campus Plan 2009-13



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ORILLIA CAMPUS PLAN

Executive Summary

In January 2005, Lakehead University's Board of Governors agreed that the University should pursue a strategic objective to create a branch campus in Orillia.

In September 2006, the Orillia Campus opened its doors at Heritage Place with a charter class of 131 students. The following year enrolment grew to 308 students, and in 2008, the total enrolment was 437 students.

The Orillia Campus currently operates from two leased locations in downtown Orillia. A permanent campus is planned to open in September 2010 on an 85 acre site donated by the City of Orillia. It is expected that this site will be developed over the next 10 – 15 years, and will accommodate 7,000 students.

There are a host of reasons why this objective makes good sense for Lakehead University, for Simcoe County, the Province of Ontario, and Canada.

For Lakehead University and Thunder Bay, Lakehead—Orillia will

- contribute to the University's sustainability as a comprehensive university with a national reputation for value-added undergraduate education and a growing reputation for research excellence;
- provide substantive growth of Lakehead University's undergraduate enrolment;
- increase revenues to support both the Thunder Bay and Orillia campuses;
- enhance the University's ability to attract students from the GTA (Greater Toronto Area) who would not consider going to Thunder Bay
- increase opportunities for innovative degree programming;
- increase distributed learning opportunities and optimize use of the Lakehead's e-learning capacity;
- provide a physical and political presence in southern Ontario and improve the visibility and marketing of Lakehead University;
- establish a broader fundraising base.

For Simcoe County, Lakehead—Orillia will

- provide the population with the skills and knowledge required to make the transition to a knowledge-based economy;
- provide the means to raise the percentage of university graduates in the County from the current 13% (1 in 8) to the provincial average of 25% (1 in 4);
- create accessible university education to a fast-growing population for which there are limited options in the immediate area;



- provide attractive, high-quality post secondary education programs that will attract people from across Southern Ontario and further afield;
- promote research and development initiatives in social and environmental sustainability;
- contribute to the economic growth of Simcoe County through the creation of direct and indirect jobs;
- establish an important public facility for Simcoe County;
- be a demonstration project of sustainable development and environmental management—the first LEED platinum campus in Canada;
- be an active communal participant, responding to the needs of the area, creating new opportunities for business and the wider community.

For the Province of Ontario, Lakehead—Orillia will

- contribute part of the solution to provide spaces for the anticipated increases in the number of students from the GTA trying to find a university within commuting distance. Orillia is readily accessible to the northern GTA (e.g. Vaughan, Newmarket, Aurora, Alliston, Bradford, and Barrie) and reverses the commute along both the Highway 400 corridor and the GO system;
- meet the needs of students with degree programs of known quality delivered by an established university thoroughly familiar with the requirements of existing quality assurance frameworks;
- meet the needs of these students in a highly cost-effective manner. It is less expensive to expand the services of an existing institution than it is to establish a new one, especially, an institution such as Lakehead—Orillia which is now entering its fourth year of operation and has already received significant financial support from the City of Orillia, Simcoe County and a growing list of donors.

For Canada, Lakehead—Orillia will

- provide the population with the skills and knowledge required to make the transition to a knowledge-based economy;
- provide research on social and environmental sustainability;
- be a demonstration project of sustainable development and environmental management—the first LEED platinum campus in Canada;
- be an active community participant, responding to the needs of the area, creating new opportunities for business and the wider community;
- Continue to provide Aboriginal people with access to university programs and services.



Background

Since 2006, Lakehead University has offered undergraduate academic programs in leased facilities in the downtown core of Orillia while working with the City of Orillia to establish a new permanent site. The University began work on the plan for its permanent campus site, and in 2009 an 85 acre (34.4 hectare) property was officially donated by the City of Orillia.

Initially, Lakehead University will establish a campus which will accommodate up to 2,000 students: up to 1,500 students at the permanent campus site and a further 500 students at the existing space in downtown Orillia. Academic programs offered will include undergraduate interdisciplinary and professional programs in Arts and Sciences, Environmental Studies, Education, Business Administration and Social Work.

Over the next 15 to 20 years, the University intends to expand the range of programming offered at the new campus, and expects to accommodate approximately 7,000 students in 1.5 million square feet of new academic, instructional, research, and support spaces as funding becomes available. In addition, residence space will be developed on the campus.

There is an undisputed need for improved access to university education in Simcoe County. Compared to the provincial average, the region has a much lower percentage of the population with a university education. In Orillia, only 13% of 24-64 year-olds have attended university compared to 25% in Ontario and 23% in Canada (Statistics Canada 2006). The demand in the region will also increase: the number of 15-24 year-olds in the Simcoe County population will increase by nearly 20% between 2005 and 2031 (Statistics Canada estimates 2005 and Ontario Ministry of Finance projections 2006). Further, the Orillia Campus is also well positioned geographically—just ninety minutes north of downtown Toronto—to provide some of the additional spaces required to accommodate undergraduate students from the Greater Toronto Area. As the branch campus of an established university with a national record for value-added undergraduate education, Lakehead's Orillia campus offers a cost-effective and high quality solution to meeting the need for additional university capacity in Simcoe County and the GTA.

Introduction

The overall objective of the Lakehead University – Orillia campus 5-year plan is to chart the course by which the Orillia Campus will become one of the top primarily undergraduate university campuses in the Province. Building on Lakehead's reputation as Canada's #1 value-added university, the Orillia Campus will be known for its academic and program excellence, accessibility, intimate learning environment, and faculty-student engagement. Our students will be known for their academic, technical and professional expertise and their commitment to beneficial social and environmental engagement.

We intend to become the campus of choice for students, faculty and staff who are all imaginative, creative and talented; we intend for all our alumni, students, faculty and staff to characterize our campus in this way.



This Orillia Campus Plan (2009-13) which follows was developed in a collaborative process involving the City of Orillia, Simcoe County, and the University communities in Thunder Bay and Orillia. Campus planning began in earnest in April 2008 with a *University-Community Colloquium* out of which emerged a series of planning committees which were delegated responsibility for the key components of the plan: specifically, the academic plan (appendix A), the enrolment management plan (appendix B), and the revised business plan (appendix C).

The Orillia Campus Plan (2009-13) is firmly rooted in both the Vision and the Mission of Lakehead University.

Both the Vision and the Mission will be realized within the context of Lakehead University's 2010 – 2013 Strategic Plan which emphasizes **comprehensiveness, diversity, research** and **sustainability**.

The Orillia Campus Plan 2009-13 is guided by the Strategic Plan (2010 – 2013) and two other documents: the University's Academic Plan and its Research Plan. Taken collectively, these documents have circumscribed our planning and the recommendations offered below, which constitute the core of the Orillia Campus Plan 2009-13, are not in any way offered as an alternative to these documents, but only as a contribution to the vision, mission and goals they articulate: The goal is to create "one university: two campuses."

Comprehensiveness (18 recommendations)

In meeting the University's commitment to comprehensiveness, the Orillia campus currently offers the following programs: HBASc, HBAScBEEd, BAScBEEd, BAdmin (1 yr college transfer), and HBSW (1 yr post-degree).

The Orillia campus plan recommends the following additions to its existing programming:

C1. By fall 2009, establish within the HBASc-Interdisciplinary Studies the following 20 FCE (full course equivalent) majors:

Anthropology
Biology
English
Geography
History
Psychology
Sociology

C2. By fall 2009, establish the HBASc-Interdisciplinary Studies (Environmental Sciences) and the HBASc-Interdisciplinary Studies (Environmental Studies) major.

C3. By fall 2010, establish the HBASc-Interdisciplinary Studies (Criminology Sciences) and the HBASc-Interdisciplinary Studies (Criminology Studies) majors.

C4. By fall 2010, Communications and Media Studies will be added as an area of specialization.



C5. By fall 2012, depending on enrolment, specializations in Physical Science.

The Orillia campus plan recommends the following additions to professional programming offered at the campus.

C6. By fall 2009, establish the 4 year Honours Bachelor of Social Work at the Orillia campus.

C7. By fall 2009, establish the 4 year Honours Bachelor of Commerce at the Orillia campus.

C8. By fall 2009, establish the Bachelor of Education (primary/junior) professional program year for both concurrent and consecutive BEd students at the Orillia campus.

C9. By fall 2010 develop and assess the feasibility of introducing a quantitative methods course in year II of the HBASc as a required course.

C10. By fall 2009, establish the Masters of Business Administration at the Orillia campus.

C11. In the spring/summer terms of 2010, begin offering AQ (Additional Qualification for Education) courses at the Orillia campus.

C12. By fall 2012, determine the feasibility of the Bachelor of Education (junior/intermediate) and the Bachelor of Education (intermediate/senior) professional program years for both concurrent and consecutive BEd students at the Orillia campus.

C13. By fall 2011, establish the Master of Education program at the Orillia campus.

C14. By fall 2011, determine the feasibility of offering a co-op program in Environmental Sciences/Studies and Commerce at the Orillia campus.

The Orillia campus plan recommends the following additions to its programming to increase opportunities for learners seeking access to university and to establish pathways for community college learners.

C15. By fall 2010, offer a “gateway” program to high potential applicants who fall short of admission.

C16. By fall 2010 offer a *University Transition* program targeted to currently ineligible learners.

C17. By fall 2010 develop the *HBASc College Transfer* program and run it as a five year pilot.

C18. By fall 2010, the Orillia campus, working in conjunction with Aboriginal communities within Simcoe County and with the University’s Aboriginal



Management Council, will bring to Senate, a plan (i.e. academic plan, enrolment management plan, and business plan) to provide more university-level learning opportunities for Aboriginal learners within Simcoe County.

Diversity (3 recommendations)

In meeting the University's commitment to diversity and internationalization, the Orillia campus plan recommends the following additions to its existing programming:

- D1.** By fall 2010, develop a plan for establishing an English as a Second Language Summer Institute at the Orillia campus.
- D2.** By fall 2010, working in conjunction with Lakehead International, develop and formalize an international exchange program which, minimally, would provide all HBASc students with the opportunity to study abroad in their third year.
- D3.** Prior to spring 2009, working in conjunction with Continuing Education and Distributed Learning (CEDL) establish a three-year plan for CEDL activities emanating from the Orillia campus.

Research (2 recommendations)

The Orillia campus plan includes the following recommendation to support the University's research goals.

- R1.** All full-time faculty will as a part of the annual review process submit to the campus dean a research plan for the following academic year. The plan will identify individual research goals, expected outcomes, required resources and plans for securing internal and external funding.
- R2.** The Orillia campus will become known within the province as a centre of interdisciplinary and inquiry-based learning.

Sustainability (4 recommendations)

The Orillia campus plan includes the following recommendations to contribute to the sustainability of Lakehead University.

- S1.** By fall 2009, develop a sustainability metric for all academic programs offered at the Orillia campus, including Continuing Education and Distributed Learning (CEDL), establishing an FTE student/FTE faculty floor for each program offered at the Orillia campus. Each program below its sustainability metric will be reviewed and following the review will be modified, suspended, or eliminated.
- S2.** By spring 2009, develop a revised business plan.
- S3.** By spring 2009, develop an Orillia Campus Enrolment Management Plan.
- S4.** By fall 2009, establish an Orillia Campus Environmental Sustainability Plan.



APPENDIX A – ORILLIA ACADEMIC PLAN

Introduction

In keeping with our commitment to “One university: two campuses,” this academic plan adheres to the overall vision and fundamental principles contained in the 2005-2010 Strategic Plan and the 2006 Academic Plan for Lakehead University as a whole. The academic plan focuses specifically on plans for the growth of the Orillia campus, which is intended to contribute to the overall sustainability of Lakehead University.

Governance

This plan assumes the continuance and expansion of the governance model for the campus, as passed by Senate in March 2008. Implicit in that model are three commitments:

1. The Orillia campus is committed to collegial governance in all aspects of its planning and operation.
2. The Orillia campus is committed to collaboration between departments and faculties on both campuses. Our aim is to ensure the greatest degree of continuity with the policies and procedures of the main campus, without compromising operational efficiency at the Orillia campus.
3. The Orillia campus is committed to developing its programs in collaboration with relevant departments in Thunder Bay.

Typically, everyone who teaches at the Orillia campus is also a member of a disciplinary department in Thunder Bay. Faculty in the Department of Interdisciplinary Studies at the Orillia campus are subject to the same policies and procedures applicable to faculty in joint appointments at the Thunder Bay campus. While issues related to immediate supervision (leaves, schedules, complaints, etc.) are primarily handled in Orillia, academic issues (hiring, PTR, selection of course offerings, and introduction of new courses or programs) involve consultation and collaboration between Thunder Bay and the Orillia campuses.

Teaching, research and service at Orillia

Full-time faculty at the Orillia campus are expected to teach, research and contribute to the University and the community.

Teaching

The following principles are given priority in the development and delivery of curriculum at the Orillia campus:



Interdisciplinarity

Sharing Lakehead University's overall commitment to excellence in undergraduate and graduate education, the Orillia campus is committed to interdisciplinary programs that overlap and intersect with disciplinary and interdisciplinary programs at the Thunder Bay campus. At the Orillia Campus, we seek to foster an interdisciplinary culture, giving all students the opportunity to experience interdisciplinarity in various programs or courses.

Interdisciplinary studies involve multiple disciplines that link together or intersect through the sharing, integration, and interrogation of concepts, questions, or methodologies. As such, they foster an awareness of complex issues that transcend disciplinary boundaries, encouraging students to think critically when addressing global problems and enabling them to be well-prepared for post-degree jobs that require wide-ranging knowledge and well-rounded abilities. Teaching at the Orillia campus should explore and emphasize interdisciplinary perspectives, introducing students to issues and cases that require multidimensional approaches.

While the core programs at the Orillia campus (the HBASc and the HBAScBEd) are overtly interdisciplinary, it is understood that not all courses or all programs can or should achieve an identical level of interdisciplinarity. Some courses preserve disciplinary boundaries while embracing the opportunities to reflect critically upon them. Some courses are disciplinary, but regularly incorporate insights from other disciplines. Moreover, we recognize that certain programs with professional and accreditation requirements may restrict electives within their disciplines so as to ensure academic standards. Still, wherever possible, interdisciplinary options will be made available to our students.

The interdisciplinary culture at Orillia seeks to foster (and our students aim to acquire) fluencies in multiple domains of knowledge:

Scientific fluency: students and faculty should work to develop an understanding of scientific reasoning and the history of science.

Critical literacy: students need to learn (and their instructors need to show) how to evaluate arguments, to separate logic from fallacy, and to present a persuasive account of their reasoning.

Cultural literacy: students should become familiar with the variability in cultural reasoning, and how this influences the humanities and social sciences.

Environmental awareness: students and faculty should work to infuse an ecological sensibility and sense of responsibility into their work, study, and lives.

Community engagement: students and instructors should seek to connect their endeavours to the wider communities in which they live.

Inquiry-based learning

Inquiry-based learning will be at the heart of the educational community at the Orillia campus. Inquiry-based learning is active, student-centered learning focused around key questions. These questions involve critical reflections upon methodological strategies and theoretical principles, enabling students not only to see the multiplicity of knowledge debates but also to envision knowledge itself as debatable. Inquiry-based learning provides students an empowering context within which to apply prior knowledge and gives students practice in utilizing academic tools/skills



to address complex problems. Through their commitment to inquiry-based learning, faculty members should encourage their students to be active rather than passive participants in their learning. Faculty members should be involved in academic advising to students and should be adequately trained to that end.

Diversity

Lakehead University recognizes the diversity of its students, faculty and staff. Responding to students' needs, it seeks to offer courses that will enable students to complete their education in a variety of ways. The Orillia campus is committed to assisting all learners in "learning how to learn," equipping them to be effective learners in a variety of pedagogical settings. All learners at the Orillia campus will complete at least one full credit course that uses e-learning as its primary mode of delivery.

Environmental awareness

In order to become fully "green," Lakehead University Orillia Campus will offer academic programming that promotes awareness regarding multiple aspects of environmental issues and complexities.

Existing courses in environmental studies will be offered on a regular basis. As well, specific programs addressing environmental management from both arts and science perspectives should be developed.

Research and Service

Full-time faculty members will maintain a reasonable balance between teaching, research, and service.

Resources

As with the Thunder Bay campus, Lakehead University is committed to providing resources to enable Orillia's academic growth. Lakehead University is committed to expanding programs and program offerings. As student numbers at the Orillia Campus increase, Lakehead University will also increase the number of qualified full-time faculty.

Lakehead University is committed to ensuring that class sizes at the Orillia campus are sustainable and pedagogically effective. The principles of the Academic Charter will guide resource allocation to students, faculty and academic units at the Orillia Campus.

Academic programming 2009-2013

There are aspects of this academic plan that are distinctly shaped by our geographical location in South Central rather than Northwestern Ontario. Lakehead University acknowledges Orillia's particular role in serving the population of Central Ontario, including Simcoe and surrounding counties and extending to the Greater Toronto Area. The campus also reaches beyond its regional location to the rest of Ontario, Canada, and the world.

Lakehead University is committed to offering programs at the Orillia campus which can be started and completed in this location.



The Orillia campus currently offers the following programs: HBASc, HBAScBEEd, BAScBEEd, BAdmin (1 yr college transfer), and HBSW (1 yr post-degree).

The Orillia campus plan recommends the following additions to its existing programming:

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- Biology
- English
- Geography
- History
- Psychology
- Sociology

By fall 2009, establish the HBASc-Interdisciplinary Studies (Environmental Sciences) and the HBASc-Interdisciplinary Studies (Environmental Studies) major.

By fall 2010, establish the HBASc-Interdisciplinary Studies (Criminology Sciences) and the HBASc-Interdisciplinary Studies (Criminology Studies) majors.

By fall 2010, Communications and Media Studies will be added as an area of specialization.

By fall 2012, depending on enrolment, specializations in Physical Science.

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By fall 2010 develop and assess the feasibility of introducing a quantitative methods course in year II of the HBASc as a required course.

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The Orillia campus plan recommends the following additions to its programming to increase opportunities for learners seeking access to university and to establish pathways for community college learners.

By fall 2010, offer a “gateway” program to high potential applicants who fall short of admission. By fall 2010, offer a *University Transition* program targeted to currently ineligible learners. By fall 2010 develop the *HBASc College Transfer program* and run it as a five year pilot project.

By fall 2010, the Orillia campus, working in conjunction with Aboriginal communities within Simcoe County and with the University’s Aboriginal Management Council, will develop a plan (i.e. academic plan, enrolment management plan, and business plan) to provide more university-level learning opportunities for Aboriginal learners within Simcoe County.

By fall 2010, develop a plan (i.e. academic plan, enrolment management plan, and business plan) for establishing an English as a Second Language Summer Institute at the Orillia campus.

By fall 2010, working in conjunction with International Studies, develop and formalize an international exchange program which, minimally, would provide all HBASc students with the opportunity to study abroad in their third year.

Prior to spring 2009, working in conjunction with Continuing Education and Distributed Learning (CEDL) establish a three-year plan for CEDL emanating from the Orillia campus.



APPENDIX B – ORILLIA ENROLMENT MANAGEMENT PLAN

Introduction

The purpose of the Orillia Campus Enrolment Management plan is to articulate how we will recruit and retain students at the Orillia Campus. Specifically, the recommendations in this plan identify the means by which we will achieve the following enrolment targets:

2009/10: 700 FTE (full-time equivalent) students
2010/11: 1100 FTE (full-time equivalent) students
2011/12: 1300 FTE (full-time equivalent) students
2012/13: 1500 FTE (full-time equivalent) students

This plan will be developed in concert with the University's Enrolment Management Committee, but responsibility for its implementation rests with the Orillia campus.

Enrolment (11 recommendations)

Goal: To increase the size and diversity of the total undergraduate population at the Orillia campus.

- E1. Develop strong academic programs that will attract students to the campus.
- E2. Focus recruitment initiatives in targeted markets (Simcoe County, GTA, York Region, and communities within the 100 km radius).
- E3. Identify Community Colleges (or programs) to serve as feeders into the University's degree programs and expand transfer opportunities.
- E4. Expand relationships with students and their families from their first expression of interest in the university until they graduate and beyond.

Goal: To develop effective marketing and recruiting strategies.

- E5. Work closely with the Director of Admissions and Recruitment, and the Manager of Undergraduate Recruitment and Office of Communications to develop an effective marketing and recruiting campaign to:
 - a) Understand the demographics, needs, and primary influences on the marketplace from which our students come;
 - b) Assess all current publications (print, electronic, etc.) and determine if there is a need for specific Orillia material;
 - c) Improve Orillia Campus website functionality and navigation for prospective and current student usage, to include interactive features (virtual tour, etc.);
 - d) Identify key technologies that can be implemented to assist in recruitment.



E6. Improve daily campus and large campus visit programs:

- a) Expand Open House and Preview programming;
- b) Promote campus tours;
- c) Create specific opportunities for High School visits (Gr. 11 & 12 days).

E7. Expand relationships with the guidance counsellor community:

- a) Develop yearly guidance counsellor event;
- b) Promote the campus and university through yearly Regional/Provincial Dialogue programs.

E8. Develop a plan to attract international students.

E9. Work with Lakehead International to promote international exchanges.

E10. Expand opportunities for faculty, alumni and current students to participate in recruitment and retention-related activities.

E11. Continue to work with the Director of Admissions and Recruitment and other stakeholders to develop an annual admission plan and program that produce targeted results and identify the resources needed to achieve them.

Retention (5 recommendations)

Goal: To develop a model to evaluate and support the campus's retention efforts.

RE1. Develop a campus wide assessment tool that will identify specific factors that may lead to attrition.

RE2. Develop a method for identifying students who are at risk.

RE3. Expand campus interventions (e.g. Early Alert program, yearly academic advising, and mandatory skills workshops) that will support students and assist in retention efforts.

RE4. Continue to develop the academic advising model to ensure that all students are receiving the guidance necessary to ensure their academic success.

RE5. Enhance student learning and success for students in their first year and beyond by supporting retention-related programs and services (e.g. Academic Advising, Counseling Services, Students with Disabilities, Career Services, Peer support programs).

Student Life / Engagement (3 recommendations)

Goal: To develop in Lakehead University-Orillia students a commitment to be engaged citizens of their communities.



SL1. Create campus wide programming that supports community service and civic engagement.

SL2. Incorporate community engagement into the residence life program.

- a) Expand the use of the residence halls for academic and community building activities;
- b) Creation of 'living/learning' communities (e.g. First Year Experience FYE).

Goal: To create meaningful ties between alumni of both campuses of the University.

SL3. Develop an integrated alumni strategy for the Lakehead University – Orillia.

- a) Plan and implement a "homecoming" style event
- b) Partner and support events sponsored by Lakehead's Alumni Office.



APPENDIX C – ORILLIA BUSINESS PLAN

Background

In January 2005, Lakehead University Board of Governors agreed that the University should pursue a strategic objective to create a satellite campus in Orillia.

In September 2006, the Orillia Campus opened its doors at Heritage Place with a charter class of 131 students. The following year enrolment grew to 308 students, and in 2008, the total enrolment was 437 students. Programs offered in 2008-09 included:

- Honours Bachelor Arts & Science
- Bachelor Arts & Science/Bachelor of Education – Primary/Junior
- Honours Bachelor Arts & Science/Bachelor of Education- Primary/Junior
- Honours Bachelor of Social Work

The Orillia campus currently operates from two locations in downtown Orillia – Heritage Place and 27 West St. Under the current timelines, the permanent campus location in southwest Orillia will be open in September 2010. Preliminary projections suggest that there will be an ongoing need for the Heritage Place facility, beyond the opening of the permanent site. The need for the 27 West location, beyond June 2010, is currently under review.

The City of Orillia has donated land from the Horne Farm to Lakehead University for the development of the permanent Campus. This is an 85 acre site that is located just west of Highway 11 at Old Barrie Road. This site will be developed over time, with the expectation that it will accommodate up to 7,000 students.

The University's expansion into Orillia is a fundamental part of a wider strategy for Lakehead's future and fits with several of its ongoing strategic initiatives.

For Lakehead University and Thunder Bay, Lakehead—Orillia will

- contribute to the University's sustainability as a comprehensive university with a national reputation for value-added undergraduate education and a growing reputation for research excellence;
- provide substantive growth of Lakehead University's undergraduate enrolment;
- increase revenues to support both the Thunder Bay and Orillia campuses;
- enhance the University's ability to attract students from the GTA (Greater Toronto Area) who would not consider going to Thunder Bay
- increase opportunities for innovative degree programming;
- increase distributed learning opportunities and optimize use of the Lakehead's e-learning capacity;
- provide a physical and political presence in southern Ontario and improve the visibility and marketing of Lakehead University;
- establish a broader fundraising base.



For Simcoe County, Lakehead—Orillia will

- provide the population with the skills and knowledge required to make the transition to a knowledge-based economy¹;
- provide the means to raise the percentage of university graduates in the County from the current 13% (1 in 8) to the provincial average of 25% (1 in 4);
- create accessible university education to a fast growing population for which there are few options in the immediate area;
- provide attractive, high quality post secondary education programs that will attract people from across Southern Ontario and further afield;
- establish a research and development centre with expertise in social and environmental sustainability;
- contribute to the economic growth of Simcoe County through the creation of direct and indirect jobs;
- establish an important civic facility for Simcoe County;
- be a demonstration project of sustainable development and environmental management—the first LEED platinum campus in Canada;
- be an active communal participant, responding to the needs of the area, creating new opportunities for business and the wider community.

For the Province of Ontario, Lakehead—Orillia will

- contribute part of the solution to providing spaces for the anticipated increases in the number of students from the GTA trying to find a university within commuting distance. Orillia is readily accessible to the northern GTA (e.g. Vaughan, Newmarket, Aurora, Alliston, Bradford, and Barrie) and reverses the commute along both the Highway 400 corridor and the GO system.
- meet the needs of students with degree programs of known quality delivered by an established university thoroughly familiar with requirements of existing quality assurance frameworks;
- meet the needs of these students in a highly cost-effective manner. It is less expensive to expand the services of an existing institution than it is to establish a new one, especially, an institution such as Lakehead—Orillia which is now entering its fourth year of operation and has already received significant financial support from the City of Orillia, Simcoe County and a growing list of donors.

¹ Over the years the percentage of the total workforce engaged in the manufacturing base in central and southern Ontario has shrunk, as a percentage of the total workforce. Locally, most gains have come from the service sector where jobs tend to be lower paying. The current economic downturn is only adding to the decline of manufacturing jobs in central and southern Ontario. With no real expectation that the manufacturing sector will ever recover to its pre-downturn levels, there is a natural shift occurring towards a knowledge-based economy. As such the demand for post secondary, and primarily university, education is anticipated to increase significantly over the next several years. As mature students return to work and as the existing students work through the system, we anticipate an influx in unmet demand and need.



For Canada, Lakehead—Orillia will

- provide the population with the skills and knowledge required to make the transition to a knowledge-based economy;
- provide research on social and environmental sustainability;
- be a demonstration project of sustainable development and environmental management—the first LEED platinum campus in Canada;
- be an active community participant, responding to the needs of the area, creating new opportunities for business and the wider community;
- Continue to provide Aboriginal people with access to university programs and services.

In addition, there will be opportunities for collaboration with the local Aboriginal population in Simcoe County, a robust tourism sector, the Couchiching Institute, and a growing commercial business sector; all of which are all highly compatible with Lakehead University's strategic priorities and its existing programs. Further opportunities for Lakehead University – Orillia arise from the presence of the Ontario Provincial Police Headquarters, Soldiers Memorial Hospital, Casino Rama, and increasing investment as the Greater Toronto Area (GTA) extends further and further North.

Local, regional and provincial governments have all embraced this project with substantial financial commitments. The region is currently one of the fastest growing areas in the country and yet it lags behind on all key measures of population engagement in post secondary education. The significant population growth in the region coupled with its need to increase the university participation and graduation rate of that population underscore the need for the Orillia Campus. The planned permanent campus on the location of the old Horne Farm provides plenty of space for expansion as the campus grows.

Governance

The Orillia Campus is committed to the principle of "one university: two campuses. As such, the Orillia campus is committed to

- collegial governance in all aspects of its planning and operation.
- collaboration between departments and faculties on both campuses. Our aim is to ensure the greatest degree of continuity with the policies and procedures of the main campus, without compromising operational efficiency at the Orillia campus.
- developing its programs in collaboration with relevant departments in Thunder Bay.

An effective and efficient governance model that is appropriately staffed, with the necessary links back to administration in Thunder Bay, will facilitate the overall success of Orillia. A successful collaboration with Lakehead University is critical to the viability and success of Lakehead – Orillia. The mutual dependence of the two campuses will drive the future success of Lakehead University in total.

Lakehead University – Orillia is also very much dependent on successful collaborations and partnership with various institutions. Lakehead University – Orillia maintains strategic



partnerships with the City of Orillia, Simcoe County, and the respective School Boards in Simcoe County. Future partnerships and collaborations can be envisioned with the Ontario Provincial Police and other University partners.

The Financial Model

The Orillia Campus operating budget is self-supporting beginning in 2008-2009. We anticipate the capital support necessary to develop the permanent campus will come from a variety of sources including the Provincial Government, Municipal Governments, Lakehead University and fundraising initiatives.

A financial summary of the projected operating budget is as follows:

	<u>2009/10</u>	<u>2010/11</u>	<u>2011/12</u>	<u>2012/13</u>
Enrolment (FTE)	700	1100	1300	1500
Income	\$	\$	\$	\$
Gross Operating Income	8,696,062	13,871,728	16,722,634	19,690,117
Expenditures	6,637,298	10,694,342	13,120,160	14,392,141
Surplus/(Deficit)	2,058,764	3,177,386	3,602,474	5,297,976

Conclusion

The Orillia Campus is contributing to the long term sustainability of the Lakehead University. It is a project that is backed by a strong partnership with the City of Orillia and the broader region of Simcoe County. The business plan over the next four years will be focused on building a strong foundation that will position the campus well for the long term.

Five-year enrolment targets and resource requirements

Enrolment targets

Over the next four years, the enrolment targets for Lakehead University – Orillia are as follows:

	<u>2009 – 10</u>	<u>2010 – 11</u>	<u>2011 – 12</u>	<u>2012 - 13</u>
Enrolment Target:	700	1100	1300	1500

Resource requirements

Staffing

The development of a campus in Orillia will require offering core academic programs that are consistent with those currently offered by Lakehead University, while at the same time providing new and unique programs that meet the needs and demands of central and southern Ontario, as well as the demands of future student populations. Over the next four years, the Orillia campus will introduce new academic programming as outlined in the Orillia Campus Academic Plan 2009-2013.

As market demand increases— and potentially changes as a result of current economic conditions—, we will investigate the possibility of establishing alternative approaches to providing education which would support and expand our existing programs. This could result in several



new programs and alternative methods of delivery. The use of videoconferencing technologies is an important aspect of our current program delivery model and integration with the Lakehead—Thunder Bay. Ongoing investment in this technology is important, as the campus expands. Future programming with Lakehead—Thunder Bay or other partners will be heavily reliant on the availability of such technologies. At the same time, strategic investment in such technologies and academic programming will help to minimize long term salary and benefit costs, while enabling the Orillia campus to offer a comprehensive list of academic programs. The ability to offer on-line courses and other alternative models of education delivery are areas that the Orillia campus will investigate and look to invest in as we build for the future.

As the size of the student population expands over the next four years, additional faculty and staff positions will be necessary to support the overall growth of the campus, including the permanent site location. In the budget, we have included positions, incremental to the existing faculty and staff cohort.

Marketing

Meeting the enrolment targets will require greater awareness within Simcoe County and the GTA of the campus as an accessible option. We propose developing and resourcing a plan for increasing the level of awareness of Lakehead University's presence in Orillia. We are budgeting \$500,000 over the next 4 years for the development and implementation of a plan.



Lakehead University
Orillia Campus
Budget Planning, 2009/2010 through 2012/2013

	 2008/2009	<c> 2009/2010	<d> 2010/2011	<e> 2011/2012	2012/2013
	Projected Year-End	Budget Plan	Budget Plan	Budget Plan	Budget Plan
1 Funds Available					
2 Gross Operating Revenue - Tuition + BIU	4,896,853	8,655,262	13,846,728	16,667,634	19,597,617
3					
4 Other Approved Base Budget Adjustments	-370,273	-1,900,373	-3,106,261	-3,741,230	-4,387,439
5 Base Budget Cut		-405,293	-644,428	-775,584	-912,611
6					
7 One-Time Funding	0	0	0	0	0
8 Operating Revenues/Transfers In	20,800	40,800	25,000	55,000	92,500
9 Recoveries			0	0	0
10 Funds Available excluding Carryforward	4,547,380	6,390,396	10,121,039	12,205,820	14,390,068
11 Carryforward from Previous Year		621,407	374,505	-198,798	-1,113,138
12 Total Funds Available	4,547,380	7,011,803	10,495,544	12,007,022	13,276,930
13 Expenditures					
14 Full-Time Faculty Salaries	1,336,015	2,492,737	3,351,812	4,049,838	5,045,592
15 Part-Time Faculty Salaries	215,221	453,583	453,583	453,583	453,583
16 LUFA Professional Salaries	54,720	175,400	175,400	175,400	235,400
17 Full-Time Staff Salaries	710,767	1,137,010	1,345,260	1,435,260	1,475,260
18 Part-Time Staff Salaries	113,595	140,095	245,095	245,095	245,095
20 GTA Salaries	12,342	15,000	15,000	15,000	15,000
21 Total Salaries	2,442,661	4,413,825	5,586,150	6,374,176	7,469,930
22 Employee Benefits: Full-Time Faculty	213,762	398,838	536,290	647,974	807,295
23 Employee Benefits: Full-Time Staff	113,723	181,922	215,242	229,642	236,042
24 Employee Benefits: Other	48,139	109,465	101,956	94,754	105,260
25 Sub-Total Employee Benefits	375,624	690,225	853,488	972,370	1,148,597
26 Total Salaries and Benefits	2,818,285	5,104,050	6,439,638	7,346,546	8,618,527
27 Non-Salary Expenses					
28 Provision for Equipment / Computers	0	0	0	0	0
29 Computing Equipment, Software and Maintenance	5,500	0	0	0	0
30 Travel	47,618	54,500	54,500	54,500	54,500
32 All Other Expenses	1,054,570	1,478,748	4,200,204	5,719,114	5,719,114
33 Total Non-Salary Expenses	1,107,688	1,533,248	4,254,704	5,773,614	5,773,614
34 Total Expenditures	3,925,973	6,637,298	10,694,342	13,120,160	14,392,141
35 Cumulative Surplus/(Deficit)	621,407	374,505	-198,798	-1,113,138	-1,115,211
36 Less: Carryforward (from line 11)	0	-621,407	-374,505	198,798	1,113,138
37 In-Year Surplus/(Deficit)	621,407	-246,902	-573,303	-914,340	-2,073

n.b. This budget projection includes the debt expenses associated with the construction of the academic building.