ACADEMIC COUNCIL REPORT

SESSION:		ACTION REQUESTED:	
Public	☒	**Decision**	☐
Non-Public	☐	**Discussion/Direction**	☒
		Information	☐

TO: **Academic Council**

DATE: **February 28, 2023**

PRESENTED BY: **Dr. Lori Livingston, Provost and Vice-President Academic
Sarah Cantrell, AVP Planning and Strategic Analysis**

SUBJECT: **Institutional Metric Target Setting Process Update**

BACKGROUND/CONTEXT & RATIONALE:
At its June 2022 meeting, the Board approved the proposed set of institutional metrics that would provide a basis for the University to track its progress towards its strategic goals as outlined in the 2021-2023 Integrated Academic and Research Plan. At the same meeting, a commitment was made to engage in a process throughout fall 2022 to develop and recommend meaningful targets to achieve for each metric. The attached information is a summary of the process to date on the recommended metric targets for discussion with Academic Council.

CONSULTATION:
Proposed institutional metric targets were developed after consultation with SLT and ALT members, key university stakeholders via email, and meetings with area Directors throughout the Fall 2022. In addition, the Faculty Association (via Joint Committee) was provided with a summary of the process to date in December 2022.

NEXT STEPS:
Incorporate feedback from Board S&P, Academic Council and SLT to formalize institutional metric targets to develop dashboards for end of year reporting to the board in June.

SUPPORTING REFERENCE MATERIALS:
See PowerPoint presentation for summary.

In Review

Purpose:

- Develop and establish a means to track and report on our success towards our goals as outlined in our Integrated Academic and Research Plan.

Principles for developing the Institutional Metrics:

- Align with our IARP Strategic Priorities
- Data exists, and can be systematized to track year-over-year progress
- Complement but do not duplicate SMA3 metrics
- Representative of Ontario Tech as a whole (who we are and what we do)

Ontario Tech University Metrics

Integrated Academic-Research Plan – Strategic Priorities

Tech with a conscience:

Innovating to improve lives and the planet by incorporating technology-enhanced learning strategies, and promoting the ethical development and use of technology for good through intensive research and inquiry.

Learning re-imagined:

Co-creating knowledge by adapting to the ever-changing educational landscape through the provision of flexible and dynamic learning and research opportunities.

Creating a sticky campus:

Cultivating student- and community-centric engagement opportunities by encouraging an inclusive culture for our institution through online and on-campus activities.

Partnerships:

Uncovering innovative solutions for their most pressing problems through purposeful research and collaboration with industry, community, government and academic partners especially as it relates to all facets of global sustainability and well-being.

The Road So Far

- **Spring/Summer 2022:**
  - Initial Institutional Metrics presented at Academic Council for discussion and feedback. Follow-up feedback meetings held with Deans and SLT.
  - Prepared Institutional Metrics Report:
    - Incorporated feedback from Strategy and Planning
    - Established overarching categories and metrics, developed data definitions and identified data sources
    - Collected multi-year data for each metric
    - Created Visualize Data to show:
      - Trends over 3 year period
      - Alignment to priorities
  - Metrics Summary Report presented to Board of Governors
- **Fall 2022:**
  - Metric and draft target information presented to SLT and ALT
  - Metric and draft target information circulated to key University stakeholders for consultation (via email)
  - Following feedback submissions from stakeholders, follow-up meeting held with area Directors for further feedback on targets

Summary of Stakeholder Feedback

Overarching Feedback:

- Additional clarity on the metric definitions, including references to:
    - Data source
    - Population
    - Time-period
    - Contributing areas/units

- Highlighting metrics/targets which are maintenance vs. growth

- Some metrics/targets could be further broken out to highlight the impact of strategic initiatives

Comprehensive Access Institution	Status	Tech with a Conscience	Learning Re-Imagined	Sticky Campus	Partnerships
	EXAMPLE ONLY	Integrated Academic-Research Plan Priority Alignment			
Student Mix (Actual and Proportion)	🟢		●	●	●
Intake Targets to Actual	🟡		●	●	
Demographics of our campus community	TBD	●		●	
Transfer students from universities and colleges	🟢		●		
Student retention	🟢			●	
Student participation in Transition activities	🟢		●	●	
LEAP Participation	🟢		●	●	
Employee Retention (Academic and Non-Academic)	🟢			●	
Transformational Education & Research Excellence					
Student Participation in Work Integrated Learning Opportunities	🟢		●		●
Partnerships supporting Work Integrated Learning	🟡		●		●
Students taking courses with Ethics or Impact component	🟢		●		
Courses taught by Full-time faculty	🟢			●	
Student to Faculty ratios	🟡		●	●	
NSSE results: Overall Student Satisfaction	🟢		●	●	
NASM/FTE ratio in instructional categories	🟡		●	●	
Flexible course formats offered (online or hybrid)	🟢		●		
Research Chairs and Institutes	🟢	●			●
Research Sponsorships and Partnerships	🟢				●
Alumni Engagement	🟡			●	●
Economic Stewardship					
Net Income/Loss Ratio	🟢				
Viability Ratio	🟢				
Primary Reserve Ratio	🟢				
Net Operating Revenues Ratio	🟢				
Credit Rating	🟢				

Legend:
🟢 - On Track/Meeting Target
🟡 - Progressing towards target
🔴 - Behind/Below target
● - Aligned with Strategic Priority

Draft Targets				
Comprehensive Access Institution		**Proposed Target**	Provincial Average	Ontario Tech 3yr Average
Student Mix (Actual and Proportion)	Proposed Targets are based on Provincial Average (as a comparator) and Ontario Tech 3 yr Average			
	Proportion of Graduate Students (distinction will be made between traditional and professional graduate programs)	between 8-10%	15%	8%
	Proportion of International Students - Overall	between 15%-17% (by end of planning period)	17%	8%
	Proportion of Female Students - Overall	50%	55%	42.6%
	Proportion of Part-time Students - UG only	between 7-10%	14%	6.6%
Reporting on demographics of our community	Target is to achieve a reportable response rate on new EDI survey			
Intake Targets to Actuals	Proposed Targets are based on the extensive discussions around enrolment targets and corridor funding.			
	Proportion of Target Achieved - Undergraduate	100%		93.3%
	Proportion of Target Achieved - Masters	100%		92.0%
	Proportion of Target Achieved - PhD	100%		79.7%
Number of transfer students from universities and colleges	Proposed Targets are based on the 3yr Ontario Tech average proportion of transfer student applications and registrations.			
	Proportion of transfer student applications	20%		20.1%
	Proportion of transfer student registration	30%		33.4%

Draft Targets				
Comprehensive Access Institution con't		**Proposed Target**	Provincial Average	Ontario Tech 3yr Average
Student retention rates	Proposed Targets are based on Provincial Average			
	CSRDE Year 1 to Year 2 Retention Rate	80% or above	83%	83.7%
	CSRDE Year 2 to Year 3 Retention Rate	95%	95%	94.0%
Student participation in Transition activities	Proposed Targets based on Ontario Tech 3yr average			
	Proportion of Incoming Students (cohort) attending one or more Transition Events	62% or above		61.6%
LEAP participation	TBD upon consultation with the Office of the Registrar & TLC			
	Proportion of Successful LEAP Participants continuing 1 semester post-program	TBD - Target will be set after 22-23, to allow for 3 yrs of data.		81.2% (from 2 cohorts)
	Proportion of Successful LEAP Participants continuing 2 semesters post-program			61.2% (from 2 cohorts)
Employee Retention (Academic and Non-Academic)	Proposed Target reflects the upper range of the employee permanence over the last 3 years.			
	Employee Permanence	Healthy employee retention would be above 90%		93.4%

	Draft Targets			
Transformational Education & Research Excellence		**Proposed Target**	**Provincial Average**	**Ontario Tech 3yr Average**
Student Participation in Working Integrated Learning opportunities.	Proposed Targets based on Ontario Tech 3yr average			
	Proportion of UG student with a WIL Experience	25%		28%
	↳ Proportion of "Traditional" WIL Opportunities	80%		82%
Number partnerships to support WIL	Proposed Target based on Ontario Tech 3yr average, and feedback from VPRI and Partnership Office			
	# of WIL Partners	400		347
Students taking courses with Ethics or Impact component	Proposed Target based on Ontario Tech 3yr average			
	Proportion of Student with Ethics/Impact Courses	27%		27.4%
Courses taught by FT faculty	Proposed Target based on Ontario Tech 3yr average (rolling)			
	Proportion of Courses taught by FT faculty	80%		79.7%
Student: Faculty ratios	Proposed Target based on 2015 Provincial Average (all instructors)	31 to 1 (or better)	31 to 1	26.8 to 1

Draft Targets				
Transformational Education & Research Excellence con't		**Proposed Target**	Provincial Average	Ontario Tech 3yr Average
NSSE results: overall student satisfaction	Proposed Targets based on Provincial Average **Question 1**: How would you evaluate your entire educational experience at this institution? **Question 2:** If you could start over again, would you go to the same institution you are now attending?			
	Question 1: % of Good/Excellent Respondents Y1	79%	79%	78%
	Question 1: % of Good/Excellent Respondents Y4	77%	77%	75%
	Question 2: % of Good/Excellent Respondents Y1	83%	83%	81%
	Question 2: % of Good/Excellent Respondents Y4	76%	76%	71%
NASM/FTE ratio in instructional categories	Proposed Target based on COU recommended target			
	NASMs/FTE	5.1	5.1	4.6
Number of flexible course formats offered (online or hybrid)	Proposed Target based on 5yr Ontario Tech median (all courses). (*5 yr median used to account for high virtual and hybrid learning in 20-21 & 21-22.)			
	% of Online/Hybrid Course Offerings	between 22-25%		24.1%

Draft Targets				
Transformational Education & Research Excellence con't		**Proposed Target**	**Provincial Average**	**Ontario Tech 3yr Average**
Research Chairs and Institutes	Through consultation with the Office of VPRI (maintenance targets)			
	Count of Research chairs	20		14
	Count of Research Institutes & Centres	7		5
Research partnerships and sponsorships	Through consultation with the Office of VPRI (maintenance targets)			
	# of External Entities involved in OnTech Research	110		114
Alumni Engagement	Proposed target reflects attainable participation rate in a range of alumni engagement mechanisms.			
	Participation/Engagement Rate of alumni	3%		-

Economic Stewardship	Draft Targets		
	Proposed Target	Provincial Average	Ontario Tech 3yr Average
Net Income/Loss Ratio	Proposed Target based on COU recommended threshold	at or above 1.5%		-
Viability Ratio	Proposed Target based on COU recommended threshold	at or around 30%		-
Primary Reserve Ratio	Proposed Target based on COU recommended threshold	at or above 30		-
Net Operating Revenues Ratio	Proposed Target based on COU recommended threshold	at or above 2%		-
Credit Rating			

Next Steps

- **Winter/Spring 2023**
    - Metric definitions and target information updates from consultations. Feedback and edits as required
    - Finalized metric definitions and target information presented to SLT/ALT
    - Data collection and metric report preparation
    - SLT sign off
    - IARP and Institutional Metrics Report to Board
    - Posting of KPIs for internal community access