



**BOARD OF GOVERNORS**  
**Strategy & Planning Committee (S&P)**

**May 11, 2023**  
**2:00 p.m. to 5:00 p.m.**  
[Hybrid](#)  
 +1 226-315-3164 this PIN: 807 222 203#

**Members:** Lynne Zucker (Chair), Eric Agius (Vice-Chair), Ahmad Barari, Kevin Chan, Laura Elliott, Mitch Frazer, Matthew Mackenzie, Steven Murphy, Michael Rencheck, Joshua Sankarlal, Jim Wilson

**Staff:** James Barnett, Sarah Cantrell, Krista Hester, Les Jacobs, Lori Livingston, Brad Maclsaac, Kimberley McCartney, Lauren Turner

**AGENDA**

No.	Topic	Lead	Allocated Time	Suggested Start Time
<b>PUBLIC SESSION</b>				
1	Call to Order	Chair	5	2:00 p.m.
2	Agenda (M)			
3	Conflict of Interest Declaration			
4	Chair's Remarks	Chair	10	2:05 p.m.
5	President's Remarks	Steven Murphy	10	2:15 p.m.
6	Strategy			
6.1	Integrated Academic Research Plan*	Lori Livingston & Sarah Cantrell	15	2:25 p.m.
6.2	Strategic Discussion: Digital Strategy* (D)	Brad Maclsaac	25	2:40 p.m.
6.3	Institutional and SMA3 Metrics* (U)	Sarah Cantrell	15	3:10 p.m.
<b>Break – 10 minutes – 3:25-3:35 p.m.</b>				
No.	Topic	Lead	Allocated Time	Suggested Start Time

6.4	Annual Programs Update* (U) (a) 2022-23 Quality Assurance Process & Program Annual Report (b) 2022-2023 Continuous Learning Annual Report	Lori Livingston	15	3:35 p.m.
6.5	International Strategy Update* (U)	Lori Livingston	10	3:50 p.m.
<b>7</b>	<b>Planning</b>			
7.1	Endowment Disbursement Recommendation* (M)	Brad MacIsaac	5	4:00 p.m.
<b>8</b>	<b>Consent Agenda</b>			
8.1	Minutes of Public Session of Meeting of March 22, 2023*	Chair	5	4:05 p.m.
8.2	S&P Annual Board Report*			
<b>9</b>	<b>Adjournment (M)</b>	Chair		4:10 p.m.
<b>BREAK – 5 minutes</b>				
<b>NON-PUBLIC SESSION (material not publicly available)</b>				
<b>10</b>	<b>Call to Order</b>	Chair	5	4:15 p.m.
<b>11</b>	<b>Conflict of Interest Declaration</b>			
<b>12</b>	<b>President’s Remarks</b>	Steven Murphy	10	4:20 p.m.
<b>13</b>	<b>Advancement Update* (U)</b>	James Barnett	15	4:30 p.m.
<b>14</b>	<b>Consent Agenda (M)</b>	Chair	5	4:45 p.m.
14.1	Minutes of the Non-Public Session of Meeting of March 22, 2023*			
14.2	S&P Action Points*			
14.3	S&P 2022-2023 Work Plan*			
<b>15</b>	<b><i>In Camera</i> Session</b>	Chair	10	4:50 p.m.
<b>16</b>	<b>Termination (M)</b>	Chair		5:00 p.m.

Lauren Turner, University Secretary

# COMMITTEE REPORT

---

**SESSION:**

**Public**   
**Non-Public**

**ACTION REQUESTED:**

**Decision**   
**Discussion/Direction**   
**Information**

**TO:** **Strategy & Planning Committee**

**DATE:** **May 11, 2023**

**PRESENTED BY:** **Dr. Lori Livingston, Provost and Vice-President, Academic**

**SUBJECT:** **2023-2028 Integrated Academic-Research Plan**

---

**COMMITTEE/BOARD MANDATE:**

The Committee is responsible for overseeing all aspects of the university’s strategic planning efforts, including the implementation and assessment of these plans in the context of the university’s vision, mission and values. Today, we are pleased to present the Committee with the 2023-2028 Integrated Academic-Research Plan.

**BACKGROUND/CONTEXT & RATIONALE:**

Since 2019, the Office of the Provost has led an institution-wide effort to create an Integrated Academic-Research Plan. The first two versions of the plan spanned two year periods (i.e., 2019-2021 and 2021-2023). As our planning processes have improved and matured over time, and given the recent addition of defined metrics against which to evaluate our efforts on an annual basis, the temporal framework of the plan now spans a five year period.

The 2023-2028 Integrated Academic-Research Plan (IARP) charts our course towards our ultimate goal of being a preeminent STEM institution. The IARP is the anchoring planning document that guides other initiatives in place or underway at the university. It works in tandem with the already existing Ontario Tech *Driving the Future with Research Excellence: Strategic Research Plan 2020-2025* and it drives our year-over-year budgeting and capital planning processes.

This document aligns our key strategic areas with explicit commitments (or goals) and the actions required to achieve them. It is informed by our previous integrated plans as well as the multiple annual plans generated by Ontario Tech’s academic and administrative units. It aligns with our Vision, Mission, and Values statements and it follows the rolling plan format first introduced in 2019. The IARP identifies the priorities and strategies that anchors our integrated planning framework. This ensures that our annual review and evaluation cycles provide the opportunity to determine the success of our actions, align resources as well as adjust to our realities. It is intentionally brief.

**CONSULTATION:**

This year's planning exercise began with members of the Ontario Tech community being invited to engage in planning activities at the unit level. The process was led by our academic and administrative leaders who worked with their colleagues to update strategies as well as evaluate the progress made on the action items contained in their 2021-2023 unit level plans. The evaluation processes are a critical step in identifying what actions have been completed, remain in progress, or have yet to be addressed. From there, each unit was positioned to identify what previously identified actions would carry forward into and what new initiatives might be included in their unit plans.

Following the completion of individual unit plans, in late November, 2022 a day long retreat with all academic and administrative unit leads was held to identify key points of intersection (or integration) between the various plans. Thereafter, a draft Executive Summary version of this document was used as the basis for university-wide town hall sessions beginning in March, 2023.

A summary of the consultations that took place may be found below. Members (i.e., students, staff, and faculty) of the Ontario Tech community were notified of and afforded opportunities to provide oral and/or written feedback on the IARP as follows:

- February 28 Notification to Academic Council of upcoming Town Hall sessions
- March 10 Draft Executive Summary version posted to the Planning Office website
- March 10 Ontario Tech Community Town Hall 1
- March 16 Ontario Tech Community Town Hall 2
- March 20 Senior Leadership Team
- March 20 Faculty Association Joint Committee
- April 10 Senior Academic Team (i.e., Deans, Registrar, Chief Librarian)
- April 25 Notification to Academic Council that the draft full-version of the plan is posted with request for feedback by May 1
- April 25 Draft Full-Version of the Plan is posted to the Planning Office website
- May 9 Senior Leadership Team
- May 11 Board Strategy and Planning Committee
- June 28 Board of Governors

**MOTION:**

That the Strategy and Planning Committee endorse the 2023-2028 IARP to the Board of Governors for approval.

---

**SUPPORTING REFERENCE MATERIALS:**

Integrated Academic-Research Plan 2023-2028

**Integrated Academic-Research Plan  
2023-2028**

DRAFT

## Vision, Mission, and Values

The University of Ontario Institute of Technology Act<sup>1</sup> envisioned a new type of university, one focused on offering programs that were innovative and responsive to the individual needs of students and to the market-driven needs of employers. Over the past 20 years, Ontario Tech has embraced this vision with its strategic commitment to being a change-maker and leader in technology-driven research, teaching and scholarship. As the institution enters into its third decade of operation, this commitment is stronger than ever. These Vision, Mission, and Values<sup>2</sup> statements differentiate us from other universities and capture the essence of our potential.

### Vision

**Embracing technology with a conscience to advance knowledge and promote sustainability.**

### Mission

**We equip future leaders to solve complex problems.**

We respond to the needs of students, and the evolving world, by providing superior undergraduate, graduate, and lifelong learning experiences. To this end, ‘what we do’ to achieve our mission and to ‘tell our story’ is guided by a community-focused approach on our 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.*

### Values

**Ontario Tech is a place where every person belongs and is free to grow their skillsets and mindsets.** We cultivate lasting relationships through:

---

<sup>1</sup> See <https://www.ontario.ca/laws/statute/02u08>

<sup>2</sup> Most recent version approved by the Board of Governors on February 25, 2021.

- **Integrity:** *Supporting a culture of trust and belonging by consistently promoting equity, fairness, kindness and ethics.*
- **Inclusion:** *Advancing a learning community where we achieve success by prioritizing reconciliation, valuing diversity and eradicating discrimination and hate.*
- **Intellectual resilience:** *Pursuing excellence in all that we do by respecting different points of view and engaging constructively when exploring ideas and advancing knowledge.*
- **Innovation:** *Inspiring world-changing ideas by re-imagining learning and in so doing, fostering an environment that provokes curiosity, creativity, ingenuity and failure while stimulating growth.*

## Twenty Years and Counting

In 2002, Ontario Tech was established as a differentiated university where students, staff, and faculty were immersed in a technology-enriched learning environment with a commitment to science, technology, engineering, and math (STEM), and professional and career-oriented degree offerings. Our founding mandate required us to be labour market-focused<sup>3</sup> while advancing the highest quality of learning, teaching, research, and professional practice, and a special mission “to provide career-oriented university programs...with a view to creating opportunities for college graduates to pursue a university degree.”

Our updated Vision (i.e., “Embracing technology with a conscience to advance knowledge and promote sustainability”), Mission (“We equip future leaders to solve complex problems”), and Values add to these founding commitments. At twenty years of age, we are emerging as a new role model in higher education – a leading public university and up-and-comer dedicated to being student-, employee-, and community-centric.

There are several key indicators of our growing strengths and reputation. One very salient example is our year-over-year percentage increase in the number of undergraduate student applications. Leading the entire provincial system by a wide margin, Ontario Tech applications jumped more than 33% during the 2021-2022 recruitment cycle, along with a 28% increase in Ontario high school students making Ontario Tech their first-choice university.<sup>4</sup> In January, 2023 data from the Ontario Universities Application Centre once again had us leading in these two categories for the 2022-2023 recruitment cycle. Ontario Tech’s reputation continues to rise as evidenced by being named one of the world’s Top 200 youngest universities<sup>5</sup> and by our demonstrated strong results in various national<sup>6</sup>

<sup>3</sup> See <https://www.ontario.ca/laws/statute/02u08>

<sup>4</sup> See [More students applying to Ontario Tech than ever before | News and announcements \(ontariotechu.ca\)](https://news.ontariotechu.ca/archives/2022/03/more-students-applying-to-ontario-tech-than-ever-before-news-and-announcements)

<sup>5</sup> See <https://news.ontariotechu.ca/archives/2022/03/ontario-tech-cracks-top-200-among-the-worlds-youngest-universities-for-first-time.php>

<sup>6</sup> See <https://news.ontariotechu.ca/archives/2022/10/macleans-2023-university-rankings-affirm-ontario-techs-impressive-reputation-for-a-student-experience-based-on-quality.php>

and international rankings.<sup>7</sup> Our students are winning awards<sup>8</sup> and competitions<sup>9,10</sup> and our researchers are securing major research awards and recognitions.<sup>11</sup>

We have come a very long way in a very short period of time, in part, because we deliberately embrace our research strengths and role in stimulating and enhancing the economy and social fabric from the Region of Durham, Northumberland County, the eastern GTA, and a growing expanse across Canada and other parts of the world. We accomplish this by working closely with university, college, community, and industry partners to sustain the aforementioned objectives and generate new and innovative future-facing opportunities in the post-secondary education and economic sectors.

Ontario Tech is situated in one of the fastest growing areas of the province. We started as a regional university that readily supported the needs of our rapidly changing local populations, employers, and communities. As we enter into our third decade, our reach has stretched around the globe. Our enhanced use of technology (e.g., online and hybrid/blended learning platforms), and growing suite of flexible learning options (e.g., microcredentials, stackable credentials) advances our commitment to accessible post-secondary education while promoting continuous lifelong learning and workforce upskilling no matter where students are situated.

By providing employment, educational, and infrastructure development opportunities, we are maintaining our commitment to revitalize the City of Oshawa's downtown core, supporting development and growth in the north end of the city as well as providing opportunities for international students and scholars. The social, intellectual, and bridging capital provided by our faculty, staff, and students is building resilience across the Region of Durham and Northumberland County and giving much needed support to community organizations in their efforts to address poverty, homelessness, crime, opioid addiction, and quality of life issues.

Through our research (e.g., with an emphasis on energy, digital technology, intelligent manufacturing, environmental sustainability, clean technologies, autonomous vehicles, aerospace, computer science, cybersecurity, forensic psychology, criminology, health and life sciences, dementia care, and much more), we are helping to re-shape the local and provincial economic landscape. The importance of this cannot be overstated as we address past and current challenges in our efforts to build a better sustainable future.

## Looking Back: Turmoil, Turbulence and Tenacity

---

<sup>7</sup> See <https://news.ontariotechu.ca/archives/2022/11/ontario-tech-again-ranked-a-top-3-engineering-school-in-ontario-international-universities-survey.php>

<sup>8</sup> See <https://news.ontariotechu.ca/archives/2022/11/ontario-techs-first-ever-cihr-doctoral-research-award-highlights-list-of-new-federal-graduate-studies-funding.php>

<sup>9</sup> See <https://news.ontariotechu.ca/archives/2022/05/tops-in-the-province-ontario-tech-masters-degree-candidate-wins-provincial-three-minute-thesis-title.php>

<sup>10</sup> See <https://news.ontariotechu.ca/archives/2022/01/ontario-tech-teams-earn-medals.-including-a-gold-at-major-business-competition.php>

<sup>11</sup> See <https://news.ontariotechu.ca/archives/2022/09/ontario-tech-researcher-dr.-marc-rosen-awarded-highest-recognition-a-canadian-academic-can-receive.php>



The COVID-19 pandemic created previously unforeseen levels of emotional, mental, and physical discomfort for every person on the planet. The pandemic upended our lives, habits, and traditions.<sup>12</sup> Like it or not, it forced us to re-evaluate every aspect of our university operations and try new things. It accelerated changes that were already underway on our campus, provided us with an opportunity to display a level of organizational agility not seen at our sister institutions, and laid bare our fiscal challenges.

In September 2020, we began the 2021-2023 planning process during the height of the pandemic. Our founding commitment to a technology-enhanced work and learning environment had allowed us to rapidly adapt to using technology to maintain our core business operations with minimal delay. At the outset of COVID-19 there were many of us who wanted to return to the familiar ways of life, work, and learning on our campus.<sup>13</sup> However, with no end in sight to the pandemic, staying connected online gradually became the norm as we all worked tenaciously to engage in our teaching and scholarship activities in the virtual environment.

The disruption caused by the pandemic challenged us to explore new, exciting, previously unforeseen, and spontaneous opportunities. We realized that our success would depend on our ability to value, celebrate, and respect our collective strengths as well as our individual differences. Continuing to collectively rally around our shared priorities was once again crucial if we were to succeed in navigating the emerging and yet to be anticipated opportunities and challenges for post-secondary institutions provincially, nationally, and globally. We knew that staying committed and focused on our four key strategic areas was essential to our success.

The following summary, while not exhaustive, provides a few examples of our achievements during the 2021-2023 planning cycle. Despite (or in spite of) the pandemic, we accomplished a great deal as evidenced by the following.

Aligned with “**Tech with a Conscience**,” Ontario Tech once again earned a gold rating in the North American Sustainable Campus Index.<sup>14</sup> We also added a new interdisciplinary research institute (i.e., Institute for Disability and Rehabilitation Research<sup>15</sup>), and added more research centres (i.e., International Atomic Energy Agency (IAEA)<sup>16</sup> Collaborating Centre, Age with Dignity Campus of Care and Best Practices Research Centre), and chairs (i.e., UNESCO Chair in Hate Studies<sup>17</sup>, Ontario Tech University Research Excellence Chairs<sup>18</sup>). In 2022, with additional resources from provincial and federal sources, researchers at Ontario Tech expanded upon and committed to an extended period of monitoring for traces of the COVID-19 virus in local

---

<sup>12</sup> See <https://www.future-ed.org/how-the-pandemic-changed-higher-education/>

<sup>13</sup> See <https://er.educause.edu/articles/2021/4/reimagining-higher-education-the-post-covid-classroom>

<sup>14</sup> See <https://news.ontariotechu.ca/archives/2022/01/top-marks-again-for-ontario-tech-universitys-sustainability-focused-practices.php>

<sup>15</sup> See <https://research.ontariotechu.ca/discover-research/institute-for-disability-and-rehabilitation-research.php>

<sup>16</sup> See <https://research.ontariotechu.ca/discover-research/iaea-collaborating-centre/index.php>

<sup>17</sup> See <https://news.ontariotechu.ca/archives/2022/11/ontario-tech-university-expert-dr.-barbara-perry-appointed-to-major-international-research-chair.php>

<sup>18</sup> See <https://research.ontariotechu.ca/discover-research/research-chairs.php>

wastewater systems.<sup>19</sup> We committed to new undergraduate (i.e., Minor in Indigenous Studies) and graduate (i.e., MA in Social Practice and Innovation) degree program offerings and supported our student, staff, and faculty usage of digital and virtual platforms governed by robust future of learning discussions and future of work policies and pilot programs.

Under “**Learning Re-imagined**” we were extremely nimble in using digital and online resources to deliver our academic programming in new and previously unforeseen ways. It was a team effort requiring cooperation from all of our students, staff, and faculty. Less visible were the supports provided by some key units on campus. For example, the Library expanded its digital collections, offered an increased array of online supports, and introduced some new open access journals (e.g., Journal of Digital Life and Learning, Journal of Educational Informatics)<sup>20</sup> while the Teaching and Learning Centre championed the creation of a growing array of Open Educational Resources<sup>21</sup> (OERs). The Teaching and Learning Centre<sup>22</sup> moreover played a pivotal role in supporting virtually every aspect of academic instruction during this time period, including the provision of assistance to a number of projects funded by the eCampus<sup>23</sup> virtual learning strategy. Our affiliated for-profit-entity Ontario Tech TALENT<sup>24</sup> began to develop and deliver a collection of industry-approved microcredentials to introduce a unique and differentiated lifelong-learning model to bridge the skills gap. We also broadened our degree program offerings (e.g., with the addition of new Bachelor degree programs in Health Administration, Educational Studies, Energy Engineering, Industrial Engineering) and new graduate programs in Business Analytics and AI, Financial Data Analytics, Software Engineering, and Education.

In terms of our “**Sticky Campus**” strategy and our people, we launched the first every demographic survey of our campus populations to gather data to inform current and future equity, diversity, inclusion, decolonization, and accessibility (EDIDA) initiatives. Our efforts in this area were broad, as evidenced by the university joining the national Indigenous and Black Engineering and Technology PhD Project to provide financial support and foster a safe, supportive, equitable and inclusive research and academic environment for Black and Indigenous scholars.<sup>25</sup> On September 30, we recognized National Truth and Reconciliation Day by making it a meeting-free day filled with a series of events to recognize our role in promoting reconciliation through education. In the fall of 2021, Ontario Tech became a signatory on the Scarborough Charter to show its commitment to continuing the dialogue and actions for more inclusive higher education. Ontario Tech also earned a Moose Hide Campaign Ambassador designation in support of a nationwide Indigenous-led grassroots movement to end violence against women and

<sup>19</sup> See <https://news.ontariotechu.ca/archives/2022/04/new-funding-ensures-ontario-tech-researchers-will-continue-to-monitor-covid-19-and-other-indicators-of-health-in-wastewater.php>

<sup>20</sup> See <https://guides.library.ontariotechu.ca/openaccess/journalpublishing>

<sup>21</sup> See <https://learninginnovation.ontariotechu.ca/oer/creating/oer-lab.php>

<sup>22</sup> See <https://tlc.ontariotechu.ca/index.php>

<sup>23</sup> See <https://vls.ecampusontario.ca/>

<sup>24</sup> See <https://ontariotechtalent.ca/>

<sup>25</sup> See [Ontario Tech joins national Indigenous and Black Engineering and Technology PhD Project | News and announcements \(ontariotechu.ca\)](#)

children<sup>26</sup> and the university's Institute for Disability and Rehabilitation Research organized a series of international virtual speaker discussions on the topic of advancing disability rights around the world.<sup>27</sup> With the world experiencing considerable geopolitical turmoil, Ontario Tech established an international emergency bursary to support students from countries experiencing war or environmental catastrophe.<sup>28</sup> In terms of our physical spaces, construction was completed on the award winning Shawenjigewining Hall,<sup>29</sup> creating new and expanded study, work and social spaces for all of our students, staff, and faculty, but more specifically the Faculty of Health Sciences, Ontario Tech Student Union, Mukwa's Den, Student Mental Health Services, and other vital student support services (e.g., Student Accessibility Services, Test Centre). The Faculty of Education also moved into Charles Hall, affirming the university's long-term commitment to finding space and cost efficiencies while at the same time helping to revitalize Oshawa's downtown core. In contrast, we leveraged our outdoor spaces on the north campus location to begin two new traditions – the hosting of convocation on Polonsky Commons and the Chancellor's Challenge, a 5 km walk run event which raised over \$160,000 for student scholarship and bursaries.

In line with “**Partnerships**,” bolstered in part by a generous donation from the estate of Nicholas Sion,<sup>30</sup> Ontario Tech's Brilliant Energy Institute<sup>31</sup> gained momentum as it built upon the energy research and expertise at the university to meaningfully contribute to Canada's leadership in reducing carbon emissions, and to strengthen energy sector outcomes regionally, provincially and nationally. Ontario Tech's and ACE's partnership with FEL Motorsports entered its second year, connecting students to hands-on practical experiences and co-op placements in the auto-racing industry.<sup>32</sup> Throughout 2022, top-secret research led by Ontario Tech<sup>33</sup> took place inside the Innovation Garage at ACE, where experts were developing Project Arrow, a national endeavour to create the prototype for a made-in-Canada zero-emissions electric vehicle. And finally, furthering its commitment to improving lives and the health of the planet, researchers in the Faculty of Social Science and Humanities collaborated with local police forces, community development corporations, and the Canadian Civil Liberties Union to launch a facial recognition technology partnership<sup>34</sup> that could have a significant impact on the future of policing.

The aforementioned summaries paint a picture of an innovative institution that presses itself to excel. Opportunity abounds and when opportunities present themselves, we are willing to embrace them. This, along with our longstanding commitment to STEM

---

<sup>26</sup> See <https://news.ontariotechu.ca/archives/2022/04/ontario-tech-prepares-for-upcoming-moose-hide-campaign.php>

<sup>27</sup> See <https://news.ontariotechu.ca/archives/2022/08/ontario-tech-hosting-virtual-speaker-series-to-advance-disability-rights-around-the-world.php>

<sup>28</sup> See [Ontario Tech establishes international emergency bursary | News and announcements \(ontariotechu.ca\)](https://news.ontariotechu.ca/archives/2022/07/shawenjigewining-hall-at-ontario-tech-recognized-with-an-oshawa-urban-design-award.php)

<sup>29</sup> See <https://news.ontariotechu.ca/archives/2022/07/shawenjigewining-hall-at-ontario-tech-recognized-with-an-oshawa-urban-design-award.php>

<sup>30</sup> See <https://news.ontariotechu.ca/archives/2022/12/ontario-tech-universitys-largest-gift-to-date-to-support-research-hub-for-innovative-clean-energy-technologies.php>

<sup>31</sup> See <https://research.ontariotechu.ca/discover-research/brilliant-energy-institute.php/>

<sup>32</sup> See [Ontario Tech's partnership with FEL Motorsports creates exciting hands-on learning opportunities for students | News and announcements \(ontariotechu.ca\)](https://news.ontariotechu.ca/archives/2022/06/ontario-tech-partnership-with-fel-motorsports-creates-exciting-hands-on-learning-opportunities-for-students)

<sup>33</sup> See <https://ace.ontariotechu.ca/project-arrow.php>

<sup>34</sup> See <https://news.ontariotechu.ca/archives/2022/06/facial-recognition-research-and-partnership-could-have-significant-impact-on-future-of-policing.php>

programming and the implementation of a technology-enabled learning environment (or TELE), means that we are viewed differently from other universities within Ontario. We are differentiated – but not as different from other institutions as we were prior to the pandemic.

The pandemic accelerated changes that were already underway on many university campuses around the world. This is because technology fuels just about everything an institution like Ontario Tech needs to do.<sup>35</sup> In 2017, futurists<sup>36</sup> were predicting that by the year 2040, academic instruction in higher education would be almost entirely virtual in nature. Where we once stood alone as leaders in hybrid and online course and degree offerings, others have quickly caught up – albeit not necessarily by choice. The question that we must now answer is how are we going to continue to differentiate ourselves and rise above others in the Ontario university sector amidst growing financial pressures, competition for students, and changing consumer, employer and industry expectations?

## Looking Forward: Trends and Transformations

The emotional roller coaster created by the pandemic appears to be mostly behind us, yet it will have a lasting effect on virtually every aspect of our operations. We have emerged more resilient<sup>37</sup> than ever and we are hitting our stride as an institution. Now is the time to build on our accomplishments and the creativity we displayed over the last two-and-a-half years to develop a bold forward-looking plan, one that moves us beyond our current realities with the goal of rising to the forefront of the post-secondary education sector in Ontario and beyond.

This goal is very ambitious given some of the longstanding and newly emerging fiscal challenges we are currently experiencing. The ongoing financial pressures, created by the imposed 2019 cut to tuition, followed by the ongoing freeze in domestic tuition rates and static grant funding, are growing in magnitude. The grant funding model, moreover, is scheduled to shift to a new, previously untested performance-based funding model with potentially less predictable outcomes. Skyrocketing inflation and rising interest rates, moreover, are reducing our spending power and having a negative impact on our students' cost of living expenses. Rising rental accommodation rates due to low rental unit availability in Oshawa, as well as bottlenecks in the processing of international student study permits and visas, are a few examples of the real and unanticipated barriers for students wishing to pursue their studies at Ontario Tech. These challenges will require all of us – every member of the Ontario Tech community – to accept a role in supporting our students and the sustainable future of our institution.

We must pursue a bold transformation agenda that builds on our unique program offerings and the current momentum of our student demand. This transformation would

---

<sup>35</sup> Grajek, S., & the 2022-2023 Educause IT Issues Panel (2022, October 31). Top 10 IT issues, 2023: Foundation Models. *Educause Review*.

<sup>36</sup> See van der Zwaan, G.J. (2017). *Higher education in 2040: A global approach*. Amsterdam: Amsterdam University Press and the University of Chicago Press.

<sup>37</sup> See <https://www.amacad.org/news/post-pandemic-future-higher-education-virtual-convening-american-academy-affiliates>

see us growing to 18,000 students by 2030 to meet the needs of the growing GTA university-aged population and international demand for STEM and professional programs. The growth will provide revenues needed to cover the costs of expansion (including enhanced academic and non-academic student, staff, and faculty support services) as well as invest in our priorities and differentiation. Growing our total student population to 18,000, with a purposeful mix of undergraduate and graduate programs will transform us into a comprehensive research intensive institution, and change our place in the higher education sector to one that has greater influence and impact in research and learning outcomes. Such growth will rely on our ability to differentiate ourselves as a preeminent STEM institution and as a destination of choice for top notch students, staff, and faculty.

The technologies and strategies we immersed ourselves in to adapt to the realities of teaching, conducting research and learning during the pandemic are now permanently embedded in our everyday lives at Ontario Tech. “Learning from everywhere”<sup>38</sup> is the new norm and students will demand the flexibility to choose between in-person and online courses. They will also expect a variety of credentialing options (e.g., microcredentials, stackable credentials, courses, degree programs, etc.) and a flexible academic calendar allowing for multiple admission points throughout the calendar year.<sup>39</sup> With technology supporting such changes, we’ll increasingly have the opportunity to marry the inclusive elements of remote learning with the social benefits of being on campus making the traditional classroom more accessible, inclusive and engaging.<sup>40</sup> This will require us to continue to build and expand upon our virtual and digital infrastructure, while at the same time determining the right balance between in-person and virtual services. This will tie directly into the strong and lasting demand among faculty and administrative staff to continue to have flexible work-at-home and other virtual work options.<sup>41</sup> Suffice it to say that post-pandemic, Ontario Tech and all other institutions of higher education cannot return to their old way of doing business and expect to survive in an era where “optionality” is the new norm.<sup>42</sup> **We will grow our proportion of online and hybrid course offerings and use “tech with a conscience” to “re-imagine learning.”**

It is easy to see that enormous change is on the horizon, yet that change will not displace the inherent value of the on-campus experience. Engagement and performance in the higher education environment is greatly influenced by a sense of safety and belonging and it is this aspect of our everyday lives that suffered the most during the pandemic.<sup>43</sup> We have a strong sense of community at Ontario Tech and it allows us to thrive on a daily basis.

---

<sup>38</sup> El-Azar, D. (2022). 4 trends that will shape the future of higher education. *World Economic Forum*. See <https://www.weforum.org/agenda/2022/02/four-trends-that-will-shape-the-future-of-higher-education/>

<sup>39</sup> Busteed, B. (2021). Pandemic-to-permanent: 11 lasting changes to higher education. *Forbes*. See <https://www.forbes.com/sites/brandonbusteed/2021/05/02/pandemic-to-permanent-11-lasting-changes-to-higher-education/?sh=431be85c452f>

<sup>40</sup> Curtin, R. (2021). Reimagining higher education: The post-COVID classroom. *Educause Review*. See <https://er.educause.edu/articles/2021/4/reimagining-higher-education-the-post-void-classroom>

<sup>41</sup> Busteed, B. (2021). Pandemic-to-permanent: 11 lasting changes to higher education. *Forbes*. See <https://www.forbes.com/sites/brandonbusteed/2021/05/02/pandemic-to-permanent-11-lasting-changes-to-higher-education/?sh=431be85c452f>

<sup>42</sup> Selingo, J. (2022). How the pandemic has changed higher education. *Future Ed*. See <https://www.future-ed.org/how-the-pandemic-changed-higher-education/>

<sup>43</sup> Curtin, R. (2021). Reimagining higher education: The post-COVID classroom. *Educause Review*. See

DRAFT

Facilities such as our Library, Hunter’s Kitchen, and the Campus Recreation and Wellness Centre are key activity hubs. By continuing to invest in research aimed at understanding the demographics of our campus populations – our students, staff, faculty, alumni and community stakeholders – we will be able to build upon this strong sense of belonging to create an environment that is inclusive and welcoming of all. This will require a heightened commitment to advocacy and philanthropy such that we may continue investing in scholarships, physical assets (i.e., upgrading existing and adding new buildings and technological infrastructure) and programs in response to the most pressing and acute needs of our students, staff and faculty. **We will continually build and evolve the “sticky campus” experience.**

Amidst public concerns about the growing ineffectiveness of universities to produce career-ready graduates<sup>44</sup>, a key to differentiating ourselves from other post-secondary education institutions includes staying true to our founding roots of being a STEM institution that offers credentials that are labour market-focused and career-oriented. However, it is time for us to take this commitment to new heights. We must and we will focus on expanding our existing co-operative education and career services programming. Our efforts must be student centric, providing opportunities for all of our learners to define a personalized approach to their education through participation in in-person and virtual experiential learning experiences (e.g., co-op placements, internships, practicums, and work-integrated learning opportunities). Engagement in world-class research projects is also an option, thanks to growing research intensity across the institution. We will grow existing internal (i.e., bringing together cross-Faculty curricular and support unit initiatives) and external partnerships and establish new ones to achieve this objective, as well as to support our growing investments in research and philanthropy. Accessing our growing alumni base and leveraging our technological expertise will be key elements of our partnership strategy. **We will continually grow our “partnership” base.**

Attaining a goal of 18,000 students will take considerable time and effort. We will intentionally strive, moreover, to ensure that we have a diverse and appropriate mix of undergraduate and graduate, domestic and international, and full-time and part-time students. We will also continue to invest in retaining students and supporting them from the moment they begin their programs of study until graduation and beyond as lifelong learners and alumni.

All of this will require **every** member of the Ontario Tech community to commit to a spirit of teamwork, continuous improvement, and excellence in all that we do. This includes envisioning ourselves as national leaders in teaching and research excellence and innovation while also intentionally contributing to the social and economic needs of the communities that we serve. Our ability and willingness to work effectively and in partnership with one another, as well as industry, community, government, and other academic partners will underpin our success in this domain.

Moving forward, staying focused on a combined growth-differentiation agenda aligned

---

<sup>44</sup> Snyder, B.R., & Thorp, H. (2022, December 15). Universities can’t do everything – they’re pulled in many directions. A refocus on teaching is in order. *Chronicle of Higher Education*.

with our core strategic priorities (i.e., tech with a conscience; learning re-imagined; sticky campus; partnerships) while adapting to a new post-pandemic reality is crucial. In doing so, we will be data driven – constantly evaluating the value of our efforts and holding ourselves capable in a constrained fiscal environment. We will grow our revenues, be efficient in our costs and purposefully invest in our priorities. At the same time, we will continue to be accountable in ensuring that our graduates are employable, and that the generation, analysis, retention, and meaningful translation of our research efforts support the greater good of society. Importantly, as we move into our next decade of existence, we will continue to envision ourselves as a growing community hub – a place where people will come together to meet and engage in social and cultural activities that reflect community needs.

This Integrated Academic-Research Plan has an important role in keeping us collectively focused to realize a sustainable future for Ontario Tech. It also aligns our activities with our vision, mission, values, strategic priorities, and resources. This is exceptionally important during periods of prolonged fiscal restraint such as the one that we have been experiencing now for some time. Our fiscal uncertainty is further complicated by the broader degree granting privileges now found within the province’s colleges as well as a growing number of industry-based education and training programs. We are being pressed to do more with less while also being held to greater levels of accountability by government and society in general.

Higher education has changed and will continue to change for sometime to come. We have a lot of work to do to stay relevant and competitive in this sector, yet opportunity abounds. Let’s lead the way by embracing this opportunity, being leaders in innovative scholarship, and continuing to build an environment in which everyone can engage in this journey through collaborative and collegial dialogue.

## Creating the Plan

Building on previous annual planning efforts, and the determination and successes of our past and present administrative leaders, faculty, staff, students, and alumni, this plan assists us in staying focused as we aspire to new levels of accomplishment and achievement in four key strategic areas:

- Tech with a conscience
- Learning re-imagined
- Creating a sticky campus
- Partnerships.

This 2023-2028 Integrated Academic-Research Plan (IARP) is a five-year plan that charts our course towards our ultimate goal of being a preeminent STEM institution. The IARP is the anchoring planning document that guides other initiatives in place or underway at the university. It works in tandem with the already existing Ontario Tech *Driving the Future with Research Excellence: Strategic Research Plan 2020-2025* and it drives our year-over-year budgeting and capital planning processes.



This document aligns our key strategic areas with explicit commitments (or goals) and the actions required to achieve them. It is informed by our previous integrated plans as well as the multiple annual plans generated by Ontario Tech's academic and administrative units. It aligns with our Vision, Mission, and Values statements and it follows the short-term, annually evaluated rolling plan format first introduced in 2019. This allows us to commit to doing "fewer things better" and to be more action oriented. It also affords the opportunity to implement an annual review and evaluation cycle to determine the success of our previously identified actions, as well as the opportunity to adjust to changing resource realities. It is intentionally brief.

This year's planning exercise began with members of the Ontario Tech community being invited to engage in planning activities at the unit level. The process was led by our academic and administrative leaders who worked with their colleagues to evaluate the progress made on the action items contained in their 2021-2023 unit level plans. The evaluation processes are a critical step in identifying what actions have been completed, remain in progress, or have yet to be addressed. From there, each unit was positioned to identify what previously identified actions would carry forward into and what new initiatives might be included in their unit plans.

Following the completion of individual unit plans, in late November, 2022 a day long retreat with all academic and administrative unit leads was held to identify key points of intersection (or integration) between the various plans. Thereafter an Executive Summary version of this document was drafted and used as the basis for university-wide town hall sessions in February, 2023. The Executive Summary version which will be available to those outside the institution complements this version of the plan which is intended for internal use only.

Before reading the remainder of this document it is important to note that even though these key strategies are sequentially presented, the commitments and anticipated outcomes associated with each are interconnected and therefore not mutually exclusive. Moreover, these strategies and the bulleted lists that follow are devoid of any order of priority and may not reflect the full diversity of activities happening within the university. This is because plans like this one are prone to expressing our common goals and objectives while inadvertently understating the tremendous contributions that each and every member of our university community makes on a daily basis. It is also important to explicitly recognize this shortcoming while expressing our sincere hope that every Ontario Tech community member will see their day-to-day contributions reflected within this document. Additionally, and perhaps most importantly, we hope to accomplish what we have outlined in this document so that we may continue to tell our story.

## **The 2023-2028 Integrated Academic-Research Plan**

This plan, including our goals, objectives, commitments, and actions, necessarily aligns with Ontario Tech's four key strategic directions. In each section that follows, a brief statement on what we aim to accomplish, our commitments (or goals), and the actions we will employ to accomplish them is included.

## **Tech with a conscience:**

### **Innovation, impact, and the social and ethical implications of technology**

**We aim** to improve the lives of humans and the planet through the ethical application of technology. It's a key component in our teaching and learning practices, administrative processes, and innovative research projects.

#### **Our Commitments**

- Intentionally differentiate ourselves as an institution committed to using technology by investing in, and utilizing, an expanded array of technological platforms and assets in research and teaching
- Create core teaching and research facilities that are purposeful and scalable
- Deliberately examine and question the use, application, social and ethical implications and impact of technology on everyday life
- Commit to being national leaders in the conversation pertaining to the future of energy, applied bioscience, environmental sustainability and technology in Canada

Attainment of these goals will be measured against actions that contribute to making Ontario Tech a great place to work, study, and play. We will know if we are on track if by 2028 we have:

- Created and expanded “clusters of excellence” (i.e., including faculty, staff, students, alumni, community partners, industry and global scholars) to add to and build on existing areas of research strength, while continuing to support the establishment of research chairs and research institutes/centres
- Fostered societal awareness amongst our students by providing in-program opportunities to study the real-world impacts and ethics of their field.
- Expanded student, staff, and faculty usage of digital/virtual platforms governed by robust policies and processes that are guided by key principles pertaining to diversity, inclusion and belonging
- Reached beyond our campus walls to establish new advisory boards and/or industry consortia to guide complex interdisciplinary conversations and community-based research and experiential learning initiatives pertaining to technology and its promise for the future, as well as its challenges

## **Learning re-imagined:**

### **Learner-centred educational options**

**We adapt** to the ever changing educational landscape by experimenting with the most effective ways to deliver flexible and dynamic student-centred learning, giving more choices to more people.

#### **Our Commitments**

- Provide flexible and personalized approaches to the student experience to create opportunities to “learn from everywhere”
- Embrace, engage and support students across the full student life cycle, from the time they apply to a program through completion of it and beyond as alumni
- Re-invent learning by defining and constructing flexible and innovative high quality pedagogical practices that combine technological solutions with on-campus and beyond-campus classes and experiential components
- Focus on being leaders in pedagogy, andragogy, and technology-related research and scholarship that is learner-focused

Attainment of these goals will be measured against actions that contribute to making Ontario Tech a great place to work, study, and play. We will know if we are on track if by 2028 we have:

- Developed and launched at least one (1) fully online degree program per academic faculty to access and meet the needs and expectations of newly emerging student markets
- Supported differentiated learning by ensuring a mixture of in-person, online, hybrid (including flexible hybrid) and asynchronous course options, while simultaneously committing to enhancing learner engagement
- Achieved at least a quarter of all undergraduate students participating in work integrated learning opportunities, including co-operative education, internships, and practicums and entrepreneurial activities
- Strengthened student learning experiences by maintaining a judicious student to faculty ratio, and by prioritizing course instruction by full-time faculty members
- Developed and offered a greater number of newly emerging “for credit” offerings (e.g., micro-credentials, stackable credentials)
- Designed and incorporated flexible approaches to the scheduling, structuring and formatting of on-campus and virtual program offerings
- Provided enhanced upskilling, reskilling, and training opportunities and supports for instructors
- Developed and implemented new methods of assessment that clearly align with defined learning outcomes and desired learner competencies while at the same time building resilience against emerging technologies and the challenges they create with regard to academic integrity
- Provided students with flexible learning by offering an open (or build your own) degree program
- Increased usage of existing (i.e., simulation, gaming, AR/VR/XR) and evolving (i.e., artificial intelligence) capabilities, technological platforms and assets to support student learning, engagement, and success
- Increased the development, creation, production, adaptation, adoption and usage of OERs in each of our Faculties
- Increased enrolment in a suite of increasingly diversified Continuous Learning offerings

## **Creating a sticky campus: A place to make lasting connections**

**We promote** positive social change and encourage an accessible, equitable, diverse, and inclusive culture for our campus community.

### **Our Commitments**

- Create new campus spaces and experiences at our downtown and north locations, in combination with our virtual and technological assets, to define new and unique learning and work environments
- Use technology to provide personalized student, staff, faculty, alumni and community experiences
- Commit to being an educational and social leader in the community
- Celebrate and promote diversity, inclusion, belonging and accessibility in all that we do

Attainment of these goals will be measured against actions that contribute to making Ontario Tech a great place to work, study, and play. We will know if we are on track if by 2028 we have:

- Achieved a baseline response rate of at least 30% on our institutional student, staff, and faculty self-identification survey to allow us to report on our student, staff, and faculty demographics
- Progressed towards a student population mix more reflective of the system medians related to the proportion of graduate students, and of international students.
- Strengthened undergraduate retention rates between Year 1 and Year 2, and Year 2 to Year 3 of their studies
- Achieved our annual intake targets for undergraduate, Masters, and PhD enrolments
- Supported student persistence and success evidence through higher participation rates in transition programming (e.g., orientation events, student supports, etc.)
- Continued to establish a strong and experienced campus community through high annual employee retention
- Continued our commitment to practical and interactive learning by maintaining space efficiency targets based on COU benchmarks for instructional space to overall student FTEs
- Hired a new Assistant Vice-President (Diversity, Inclusion and Belonging) to inform forward thinking university initiatives for students, staff, and faculty
- Constructed new or reconstructed existing capital spaces to support faculty, staff, student, and community educational, research, and service needs
- Reimagined existing physical spaces (i.e., indoor and outdoor) in combination with virtual platforms to create dedicated meeting, recreational, and social spaces and social hubs
- Invited and engaged with students on an ongoing basis to deliberately gather up-to-date and informed perspectives on their experiences, desires and career aspirations

- Supported student recruitment, persistence and success through continued investments in the Registrar's Office, undergraduate and graduate student Academic Advising, the use of AI driven analytics (e.g., early alert systems), and dedicated undergraduate (e.g., UPREP, LEAP) and graduate student support (e.g., Grad Pro Skills) programming
- Supported the mental and physical health needs of our students, staff, and faculty via the provision of enhanced health and well-being programmatic supports
- Acted on the Truth and Reconciliation Commission's Calls to Action in support of Indigenous students and the local Indigenous communities
- Welcomed greater participation from members of our local communities and region via age- and interest-specific programming (e.g., Junior Ridgebacks, Age-Friendly University initiatives) and community-specific needs
- Introduced and implemented new orientation, mentorship, and leadership programs for our faculty, staff, and students
- Expanded our commitment to sustainability through ongoing and new energy and waste reduction initiatives

## **Partnerships:**

### **Meaningful connections with our local and global communities**

**We help** industry, community, government, and academic partners be more effective by bringing them together with students and researchers to uncover innovative solutions for our partners' most pressing problems.

### **Our Commitments**

- Focus on strengthening and expanding current partnerships, philanthropy efforts and community connections to support student learning and employment opportunities, academic programs, and research priorities
- Establish dynamic, synergistic partnerships with government, community, and alumni as a differentiator for Ontario Tech
- Build our international reputation by drawing in partners and researchers from around the world

Attainment of these goals will be measured against actions that contribute to making Ontario Tech a great place to work, study, and play. We will know if we are on track if by 2028 we have:

- Enhanced alumni engagement through a variety of activities, opportunities and partnerships
- Scaled up Ontario Tech TALENT Inc. in conjunction with corporate partners and developed a business model to help our students and all of our employees upskill or reskill to ensure or enhance job-readiness
- Leveraged our career-oriented programs to establish a growing number of partnerships with small- and medium-sized local businesses and industries to support experiential and work integrated learning opportunities

- Established and nurtured respectful, collaborative connections with local and regional Indigenous communities
- Set up satellite research and partnerships offices
- Increased the number of students enrolled in collaborative programs offered between Ontario Tech and other universities and colleges, including international exchange programs
- Established new international partnerships with universities renowned for their technologically-oriented research and academic programs
- Increased the number of university-industry research chairs and institutes
- Increased the number of Ontario Tech-lead pan-university partnership agreements with industry, new startup companies, employers, community partners, and collaborative international research teams
- Experienced an increase in research granting success from funding sources both within and from outside Canada

## Tracking Our Success

As part of evolving our integrated planning processes at the University we will be creating an Institutional Metrics report card that identifies specific metrics aligned with the goals we have set out for ourselves. For each metric we will have values, definitions and targets that we want to achieve to demonstrate how we are progressing towards our goals. Dashboards for all our IARP metrics will be created and reported on annually to our community. Performance against plan will be assessed and targets will be revised as required based on progress to date and where we want to be by the end of the planning period. The institutional metrics report card will provide opportunities to reflect on our successes and strategies as well as factors that impacted our progress.

## Conclusion: Looking Toward a Sustainable Future

Ontario Tech is continuing to grow, expand, and mature into the promise its founders envisioned when it was established in 2002. It has always been a technologically forward-looking institution characterized by innovation, entrepreneurship, and a strong commitment to the betterment of society and the planet.

With the pandemic growing ever more distant in the rear-view mirror, a new normal is emerging on the road ahead. We cannot return to our old way of doing business and expect to survive in an era where choice and innovation is the new norm. We must expand our virtual and digital infrastructures to create flexible options for our students, staff, and faculty while at the same time supporting in person services and activities to strengthen and grow our already strong sense of community spirit. With intention, we must pursue a bold transformational plan – one focused on a differentiated program mix and growth in student numbers - to ensure a sustainable future for Ontario Tech.

This plan articulates what we aim to do, but it does not define how we are going to get there. To fulfill our priorities, we need a grassroots “all in” approach, to bring the plan to

life, and commit to working differently and pushing the boundaries of the possible. Through our enabling plans we will articulate how we get there from here. This will require each and every member of the Ontario Tech community – students, staff, faculty, alumni, community stakeholders and partners – to collectively engage and contribute on an everyday basis. In doing so, we will hold ourselves capable and pursue our goals with kindness, integrity, and respect. It is with our collective efforts that we will succeed and build on the solid foundation that we have already created and push Ontario Tech towards a bright, sustainable future.

This plan builds on our rapidly rising reputation as a dynamic, conscientious, and innovative technological leader in the province's higher education sector. We want to climb to the forefront of the post-secondary sector in Ontario and establish ourselves as an employer of choice and destination of choice for students, scholars, industry partners, and members of our community. We have a lot to offer and we want everyone to know about us. If we are to achieve this, we must commit to telling our story by excelling in all that we do.

As we enter into our third decade of operation, we now more than ever need to welcome faculty, staff, students, and the greater community to engage in strategic education and research initiatives with the aim of building a better and brighter future for all. Importantly, Ontario Tech is growing and diversifying to include students, staff, and faculty from around the world. Together, through an overt appreciation of our differences, products of our individual backgrounds, world views, and choices we are motivated to find solutions to complex societal problems that can serve as catalysts for improvement and change within our local and global communities. Within this planning cycle, we are confident that we will realize our goals through hard work and the implementation of the commitments articulated herein.

## Contacts

Provost and Vice-President, Academic  
Ontario Tech University  
2000 Simcoe Street North  
Oshawa, ON, Canada  
L1G 0C5  
Canada

Associate Vice-President, Strategic Planning and Analysis  
Ontario Tech University  
2000 Simcoe Street North  
Oshawa, ON, Canada  
L1G 0C5  
Canada

**COMMITTEE REPORT**

---

**SESSION:**

Public   
 Non-Public

**ACTION REQUESTED:**

Decision   
 Discussion/Direction   
 Information

Financial Impact  Yes  No      Included in Budget  Yes  No

**TO:**                                **Strategy and Planning Committee**

**DATE:**                            **March 11, 2023**

**PRESENTED BY:**    **Brad Maclsaac, VP Administration**

**SUBJECT:**                        **Reimagining IT – Update**

---

**COMMITTEE/BOARD MANDATE:**

The Strategy and Planning Committee (S&P) is responsible for overseeing the strategic planning for all aspects of the university and assessment of the plans in the context of the university’s vision, mission and values. More specifically, the committee will make recommendations on the implementation plans.

This board report and associated presentation are provided to inform the committee of the current information technology desired outcomes, risks, and the actions being undertaken to enhance the university’s position. The intent of this presentation is to provide an overview of the information technology landscape and continue to engage in a discussion on our strategies.

**BACKGROUND/CONTEXT & RATIONALE:**

In March 2022 management presented a discussion paper titled “Reimagining Information Technology at Ontario Tech” to S&P which is attached for information only as many changes have taken place over the past year. The paper was based on a number of consultations with university members of current assets and enhanced a planning framework to outline roadmaps for the institution’s IT needs in the short, medium, and long-term with an eye on optimizing the value of all IT systems. This enabling plan stemmed from Ontario Tech’s commitment in its [Integrated Academic-Research Plan 2021-2023](#) to **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. This will be innovative, inclusive, and collaborative by leveraging the best of technology and pedagogy for the benefit of students, partners and the whole world.



Over the past year a focus was placed on how to better create and disseminate the four-year plan. To orchestrate our IT initiatives in a holistic and systematic manner, it is essential to have a plan in place. Under the shared services construct with Durham College, this is even more important. While the university and college have had a process in place since inception the Integrated Academic-Research Plan provides an opportunity to enhance longer term planning. It also acts as a spring board to more transparent and consultative discussions on the IT plan. In a time of financial strain, it is crucial for universities to make the best use of available resources.

The attached discussion paper refers to “we”. It is important to repeat that “we” means the entire university community. IT Services is the body that will collate the ideas, track the plans and help deliver on the actions. IT Services will work collaboratively with all stakeholders on campus (faculty, staff and students) realizing that sometimes there will be competing demands where choices will need to be made. The decisions will be guided by the Integrated Academic-Research Plan and will be update not only once the new plan is released but annually as we try to stay ahead of the curve in an ever-changing world.

The key IT projects for the upcoming year place a strong emphasis on boosting both the student and staff experience. Firstly, we will continue the collaborative efforts with our stakeholders to enhance the university’s business processes using workflows, automations, and new system implementations. These projects will not only improve efficiency and reduce the administrative burden, but they will also free up resources to to invest in and improve the student experience. Secondly, we will focus on providing a student-centric user experience with convenient access to information and services. Investing in products such as the Ellucian Intelligent Learning Platform will grant students instant access to their courses in the Learning Management System. Lastly, we will proceed with investigations to increase movement to the cloud and will continue to invest in security projects to ensure the safety and privacy of our student and staff data. Overall, these projects represent our commitment to embracing digital innovation and using technology to achieve our strategic goals and provide a high-quality service to our students and stakeholders.

#### **RESOURCES REQUIRED:**

The paper outlines a plan for net new spend of over \$3 million a year while the current IT capital budget is normally closer to half this. The roadmaps help us work with units to prioritize new funds, examine methods to reallocate funds, and most importantly opens conversations on what is already occurring in areas based on the hard work and innovation of our employees at no to low costs.

#### **CONSULTATION:**

It is extremely important to note that this paper has been developed based on years of different discussions with numerous groups. Whether it was during Integrated Planning meetings; or new building discussions; or operational brainstorming sessions with faculties; or focus groups with students; we are tracking what desired outcomes members are looking for. With this we look for IT solutions.

More specifically the initial draft paper started with a few groups to ensure general direction was accepted and we were capturing the right level of details to share:

- Summer 2021 initial conversation with unit leads
- Mid fall 2021 a focus group including university faculty members and our [Teaching Scholars in Residence](#).
- Mid Fall 2021 a focus group including support unit representatives from Registrar’s Office, Student Life, academic Advising.
- November 2021 draft paper discussion with unit leads

Recently, the provost office approved the idea of annual meetings with:

- An IT advisory group made of representatives from each faculty
- A discussion at Graduate Studies Committee
- A discussion with support units

**QUESTIONS FOR CONSIDERATION:**

- ChatGPT, deepfakes, Big Data, surveillance capitalism, social media, pandemics, our age feels like an endless tsunami of change. Faced with this unstable and constantly challenging world, how, then, can we train our students to understand, respond to, and analyze these transformations?
- What are the consequences of our plan – for example: How does this impact faculty, staff, students? How might it influence curriculum planning? What will this do to the budget? How will this help or hinder recruitment?
- Is the committee comfortable with the university's IT direction?

**SUPPORTING REFERENCE MATERIALS:**

- presentation entitled "Digital Strategy"



# Digital Strategy S&P Presentation May 11, 2023



**“Our mandate is to...”**



# ONTARIO TECH UNIVERSITY

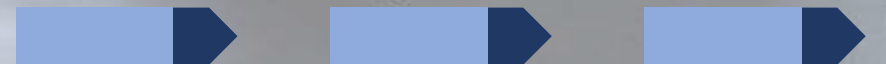
“Be a digital innovation leader and deliver a top-tier technology experience to our community.”

Increase movement to “The Cloud”: where innovation meets efficiency and security.

Create experiential learning opportunities for students and faculty

Improve student success by enhancing the digital experience and access to services

Provide students with the learning tools required to elevate their classroom experience.



## Pain of Today's Systems and Technology

Our current systems and procedures, which are predominantly manual, have become a hindrance to our day-to-day operations, restricting the productivity of our university to effectively enhance student success and retention.

**Today**



**Admin Staff**

- Multiple systems to use and inconsistent data, it's impossible to get things done!
- Why do we still have such manual processes?

**Teaching Assistants**

- Why can't I see my courses in the LMS even though I registered?
- Why can't I do more online courses? I have to work
- How many apps do I need to access to find the info?
- Why is my account disabled? I am still a student even though my TA contract is over!
- How do I get the grades into Banner again?
- Why is it so complicated to assign TAs to my courses?

**Faculty**

- How do I get my transfer credits assessed?

**Students**

- Wish I had more info to connect and engage with the Ontario Tech community

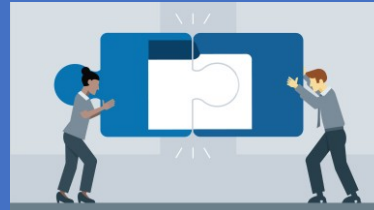
**Applicant**

- How do I get my transfer credits assessed?

**Alumni**

- Wish I had more info to connect and engage with the Ontario Tech community

## Digital Transformation



### Data & Analytics

Proactively manage by fact, data driven organization

### Systems & ERP

Establish an information technology innovation hub to provide a student-centric user experience that delivers technology based value.


### Process

Streamlined, scalable, automated processes

## Technology as a Competitive Advantage

By making strategic investments in technology, we can upgrade our operations, making them more efficient and scalable for daily tasks. This would also significantly enhance the student digital experience.

**Tomorrow**



**Admin Staff**

- Workflows help us process things faster and keep our students happy
- Having information in the same system makes my job so much easier to do

**Teaching Assistants**

- I have access to all the information I need

**Faculty**

- It's so easy to onboard TAs and instructors
- Offer more hybrid courses to engage students and provide flexibility
- I can easily identify and support at-risk students

**Students**

- I can be in class as soon as I register
- So many options for online and hybrid courses
- I can get answers to my questions at any time!
- I can handle anything without calling the main office!




**Alumni**

- Excited to hear about everything happening at the university

# IARP : Learning Reimagined






**Provide students and faculty with the learning tools required to elevate their classroom experience.**

-  Provide and support the LMS system and related learning tools to facilitate growth in the quantity and quality of online and hybrid curricular and course offerings, and open-access journals.
-  Implement and support the use of learning tools to strengthen the development, creation, production, adaptation, adoption and usage of OERs in each of our Faculties.
-  Support the implementation of a robust system to increase enrolment in a suite of increasingly diversified Continuous Learning offerings

# Digital Needs in Research

*Research projects at Ontario Tech are immense and diverse. Recently, the importance of safeguarding research data for national security issues has emerged as a foundational issue for the university research enterprise.*

*Examples of new projects that showcase these needs:*

-  *The Canadian Hub for Health Intelligence and Innovation in Infectious Diseases (HI3), lead by the University of Toronto - (2023-2027)*
-  The BioMolecular Excellence in Training, Research & Innovation Centre (BioMETRIC) – (2023 – 2028)  
Small Modular Reactors: Balancing Digital Technologies and Cyber risks for Small Modular Reactors in Remote Environments (2023-2027)
-  Creation of digital twins for prognostics and predictive maintenance for critical rotating machines (2022-2026)  
Connected Care Medical Module (C2M2) (2021-2025)





# 2023-2024

## Q1 + Q2

- Digital Experience Platform
- Implement MyCreds
- AI Technology

## Q3 + Q4

- AWS Redshift
- Intelligent Learning Platform

## Q1 through Q4

- Student Capstone Program

## Q4

- Enable self-service student options
- Movement to the cloud



Give students fast and accurate answers to their questions by utilizing intelligent bot technology

Digital experience portal will provide a streamlined student experience

Improve technology adoption with AI-based technology to increase student engagement within the LMS

Equip students for success by installing early warning systems



Enhance group collaboration in classrooms & other convergent environments by utilizing cutting edge technologies

Give students real-time access to courses on the LMS

Provide an immersive mixed reality environment that enhances the student's learning capabilities

Help students ease demanding schedules through facilitating a multitude of simulated/remote learning experiences in a virtual lab



Partner with faculty to develop capstone projects for students yielding both experiential learning and innovation

Give students relevant experiential learning experiences through formal co-op employment programs or work study assignments with IT services

Opportunities for students to enhance the university community by contributing to the development of new technology solutions



Enhance the student experience by leveraging workflow automation to streamline processes

Reduce the elapsed time for end-to-end processes through re-engineering of business procedures

Improve efficiency by seamlessly integrating innovative tools such as the Banner enterprise resource planning system

Adapt to the changing educational technology landscape by embracing cloud services to achieve agility and interoperability, while strengthening our security posture and incident recovery preparedness

# ITS MANDATE

Ontario Tech University ITS mandate is to be a digital innovation leader and to deliver a top-tier technology experience to our community. Ontario Tech students, faculty, researchers, and staff will receive an enhanced technological experience through the provision of leading industry IT resources. Partnerships will further enhance the digital expertise by collaboratively creating a robust strategic learning plan.

## Digital strategy plan

- › Digital strategy plan
- › Where next

## IT committees and projects

- › Committees
- › Project roadmap and status
- › Project intake process

## Digital moments

- › Learn more about our key digital moments

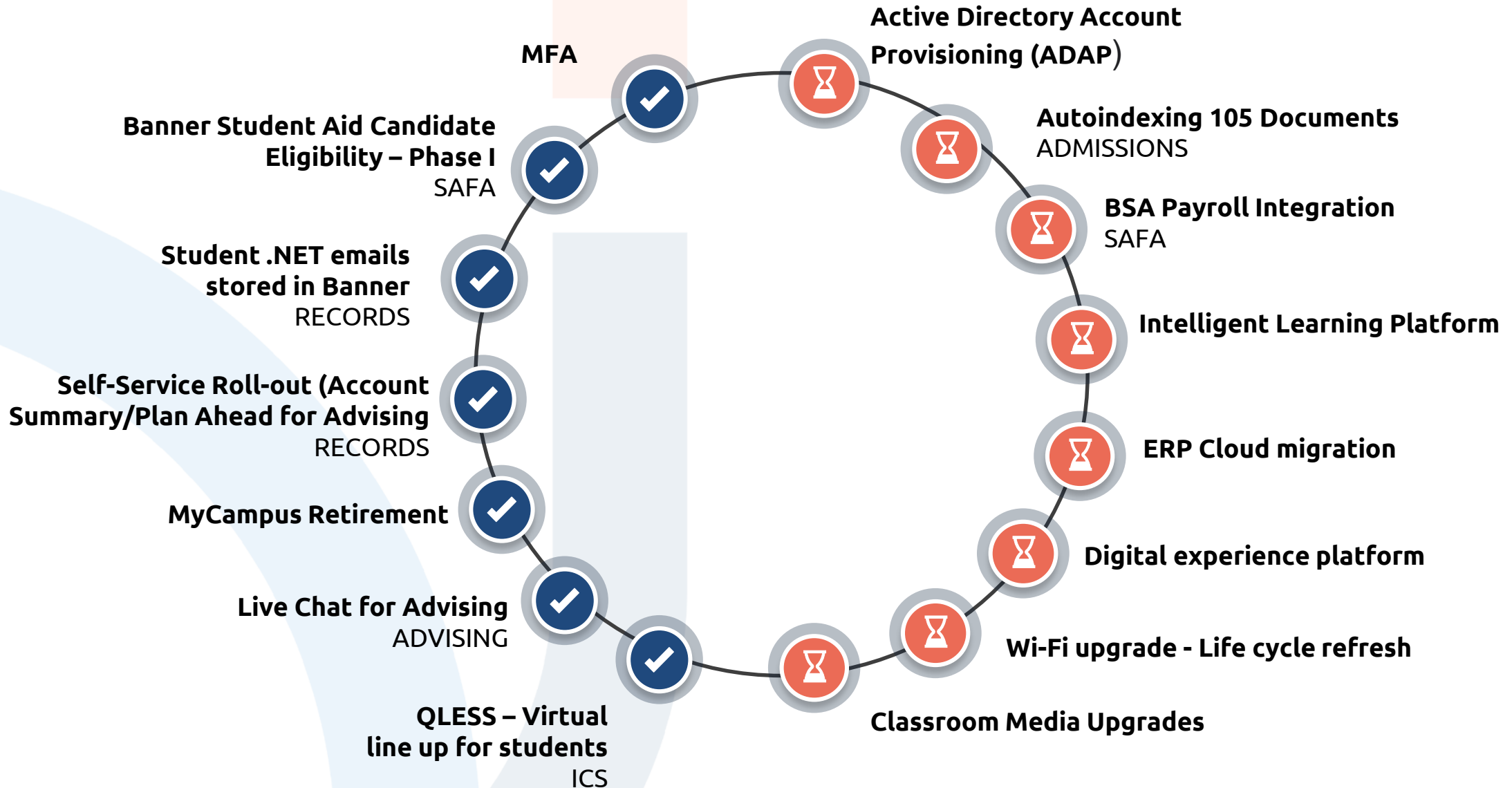
<https://itsc.ontariotechu.ca/its-mandate/index.php>

# OT-ITS PROJECT ROADMAP



✓ COMPLETED

⌚ IN PROGRESS



# ENTERPRISE ROADMAP

FY 2022		FY 2023				FY 2024				FY 2025			
Jan-Mar 2023	Apr-Jun 2023	Jul-Sep 2023	Oct-Dec 2023	Jan-Mar 2024	Apr-Jun 2024	Jul-Sep 2024	Oct-Dec 2024	Jan-Mar 2025	Apr-Jun 2025	Jul-Sep 2025	Oct-Dec 2025	Jan-Mar 2026	
Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	
Emergency contact		Standing Changes Workflow											
MyCreds			International student fees										
Synergy Gateway		Differentiated fees for out of province											
Transfer Credit Portal			TEAS Automation		Self Reporting Grades for 105								
(New Admission System Investigation)						New Admission System Implementation							
Revamp AQ Portal		OSAP Deferments		Domestic Internal Application				BSA Email Communication Automation		Refund Process (Hold **)			
MDUU - Confirmation of Interest							BSA Reporting (ODS/Cognos) (Investigation)						
Admissions - Quality Check			Research Progress Report Workflow										
TA Pool			Exam Deferral Workflow (Hold**)				Donor Gift agreement criteria						
TA Mass Upload Process		CRM Email Management						Grade Appeal Workflow (Hold**)					
Integration of Talent Management (OT HR) c/o													
Investigate Digital Experience Platforms													
Retire SSB8								Investigate solutions for Continous Learning					
Investigate Workflow Soutions								Investigate CRM solutions for Advising					
BDM Integration with Workflow & SSB								Investigate solutions for Degree Tracking					
Roll out SSB9 Functionality for all Banner modules													

# INFRASTRUCTURE ROADMAP

2023-2024				2024-2025				2025-2026				2026-2027			
Apr	Jul	Oct	Jan	Apr	Jul	Oct	Jan	Apr	Jul	Oct	Jan	Apr	Jul	Oct	Jan
Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
<b>MAINTAIN</b>															
Hardware Selection				Hardware Selection				Hardware Selection				Hardware Selection			
				Test Environment Server Replacement											
								SCCM Server Replacements				Imaging Environment Server Replacement			
												License Server Replacement			
				Virtualization Servers and Switch Replacement											

2023-2024				2024-2025				2025-2026				2026-2027			
Apr	Jul	Oct	Jan	Apr	Jul	Oct	Jan	Apr	Jul	Oct	Jan	Apr	Jul	Oct	Jan
Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
<b>IMPLEMENT</b>															
SharePoint 2019 Upgrade															
Google Storage limits															
DUO Multifactor Authentication															
				Windows 11											
				macOS Intune + Defender Full Rollout											
Github/Code Version Control															
				Bitlocker											
								Azure AD Connect				SCCM Imaging + Retire MDT			
												Azure Password Hash Sync + Password Recovery			

2023-2024				2024-2025				2025-2026				2026-2027			
Apr	Jul	Oct	Jan	Apr	Jul	Oct	Jan	Apr	Jul	Oct	Jan	Apr	Jul	Oct	Jan
Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
<b>INVESTIGATE</b>															
				SharePoint Online											
Windows 11															
				S/ T Drive Analysis											
				Vaultwarden Password Manager											
												Windows Autopilot			
				PatchMyPC											
Lab Local Admin Removal															
								Off-Campus Windows Updates Solutions							
Firmware Patching Solution (Laptops + Docks)															
				Defender Enhanced Security Settings											
				Horizon Cloud Replacement											
				Upgrade of Win 8.1 and Earlier Machines											
												Exchange Online			
												Azure AD Join Computers + Azure AD Computer Policies			
Digital Signatures for Document Signing															

2023-2024				2024-2025				2025-2026				2026-2027			
Apr	Jul	Oct	Jan	Apr	Jul	Oct	Jan	Apr	Jul	Oct	Jan	Apr	Jul	Oct	Jan
Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
<b>REVIEW</b>															
Software Deployment Solutions (Portal vs SCCM)															
				DUO Multi Factor Authentication for M365											

# Estimated Budget for Current Roadmaps

Capital Initiative (with Inflation)	2023-24	2024-25	2025-26
Enterprise	\$673,500	\$629,320	\$801,123
Service Desk	\$25,000	\$20,600	\$5,305
Audio Visual	\$61,000	\$95,790	\$73,255
Network, Telephony and Data Centre	\$1,060,000	\$1,040,300	\$758,544
Information Security	\$38,500	\$13,905	\$66,306
IT Service Management	\$79,000	\$86,520	\$105,029
Procurement Plan	\$408,578	\$344,972	\$369,755
Creative Application of Technology	\$152,000	\$23,800	\$243,000
Classroom Environment	\$331,000	\$526,000	\$629,000
Experiential Learning	\$0	\$22,000	\$42,000
Quality Information	\$304,000	\$596,000	\$699,000
-			
<b>Totals</b>	<b>\$3,132,578</b>	<b>\$3,399,207</b>	<b>\$3,792,317</b>

Note current budget has \$1.7M



## METRICS/BUSINESS OUTCOME

- 🏆 Surveys of student satisfaction and decrease in volume of student enquiries
  - Partner with the Registrars office to identify student inquires to measure
- 🏆 Increase the number of successful capstone projects
  - Partner with Faculty to develop capstone project opportunities for students yielding both experiential learning and innovation
- 🏆 Dramatic reduction in elapsed time for end-to-end processes as experienced by the student
  - Provide students real-time access to courses on the LMS



## COMMITTEE REPORT

---

**SESSION:**

Public   
Non-Public

**ACTION REQUESTED:**

Decision   
Discussion/Direction   
Information

**TO:** Strategy and Planning Committee

**DATE:** May 11, 2023

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

**SUBJECT:** Institutional and SMA3 Metrics Annual Report

---

**COMMITTEE/BOARD MANDATE:**

The Committee is responsible for overseeing all aspects of the university's strategic planning efforts, including the implementation and assessment of these plans in the context of the university's vision, mission and values.

**BACKGROUND/CONTEXT & RATIONALE:**

At its June 2022 meeting, the Board approved the proposed the 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 that would culminate into an annual Institutional Metrics report dashboard. The report is part of evolving the integrated planning framework by systematizing the accountability of our progress towards our plans.

In addition to the Institutional Metrics Annual report, the Strategic Mandate Agreement 2020-2024 (SMA3) annual report is included to demonstrate the University's achievement to target on the Ministry of Colleges and University's performance metrics. Each year the University validates the data, assesses risks for each of the metrics and adjusts where necessary any of the metric weightings for future years to minimize any potential funding loss. The 2022-23 year marks year three of five in the SMA3 reporting cycle. Performance funding gains or losses for years 1,2 and 3 of SMA3 are notional in nature as MCU decoupled target achievement and performance funding due to the impact of the pandemic. For years 4 and 5, performance funding will be recoupled and any funding loss or gains through the annual evaluation process will impact the University's performance grant funding envelope.

We are pleased to present to Board Strategy and Planning the 2022-23 Institutional Metrics and the SMA3 Metrics Annual report dashboards that illustrates progress towards our 2021-23 Integrated Academic and Research Plan and our year three achievement of our SMA3 targets as reported to the MCU.

**CONSULTATION:**

Proposed institutional metric targets were developed after consultation with Academic Council, 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 target setting process to date in December 2022.

Academic Council will be provided with the Institutional Metric and SMA3 Annual reports for information its May meeting.

**NEXT STEPS:**

Incorporate feedback from S&P, Academic Council and SLT into institutional metric dashboard for end of year reporting to the Board of Governors in June. SMA3 dashboard/results will be provided to Board in June as part of the annual reporting process.

**SUPPORTING REFERENCE MATERIALS:**

Institutional Metrics 2022-23\_final for S and P May 11.pdf

SMA Dashboard Report\_2022-23\_final for S and P May 11.pdf



# 2022-23 Report on Institutional Metrics

April 2023

# 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.



# Ontario Tech University Metrics

		IARP Priority Alignment			
		Tech with a Conscience	Learning Re- Imagined	Sticky Campus	Partnerships
					
<b>Comprehensive Access Institution</b>					
Student mix (Actual and Proportion)	●		●	●	●
Enrolment Targets to Actuals	●		●	●	
Demographics of our community		●		●	
Transfer students from universities and colleges	●		●		
Student retention rates	●			●	
Student participation in Transition activities	●		●	●	
LEAP participation	●		●	●	
Employee Retention (Academic and Non-Academic)	●			●	
<b>Transformational Education &amp; Research Excellence</b>					
Student Participation in Work Integrated Learning Opportunities	●		●		●
Partnerships supporting Work Integrated Learning	●		●		●
Students graduating with courses on Ethics or Impact	●	●	●		
Courses taught by FT faculty	●			●	
Student: Faculty ratios	●		●	●	
NSSE results: overall student satisfaction	●		●	●	
NASM/FTE ratio in instructional categories	●		●	●	
Flexible course formats offered (online or hybrid)	●		●		
Research Chairs & Institutes	●	●			●
Research Sponsorship	●				●
Alumni Engagement	●			●	●
<b>Economic Stewardship</b>					
Net Income/Loss Ratio	●	<div style="border: 1px solid black; padding: 5px;"> <p>Legend:</p> <ul style="list-style-type: none"> <li>● - On Track/Meeting Target</li> <li>● - Progressing towards target</li> <li>● - Behind/Below target</li> </ul> </div>			
Viability Ratio	●				
Primary Reserve Ratio	●				
Net Operating Revenues Ratio	●				
Credit Rating	●				

# Ontario Tech University Metrics

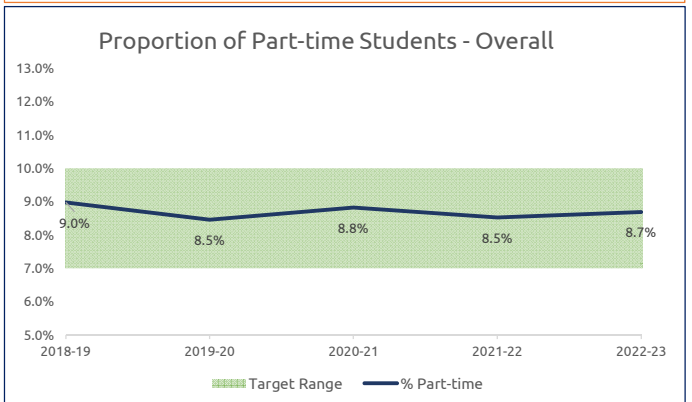
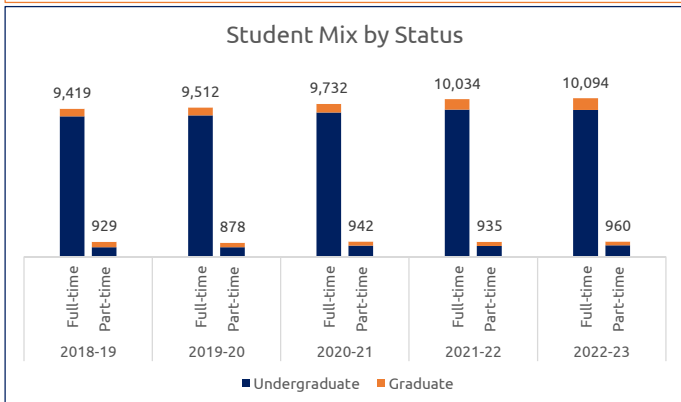
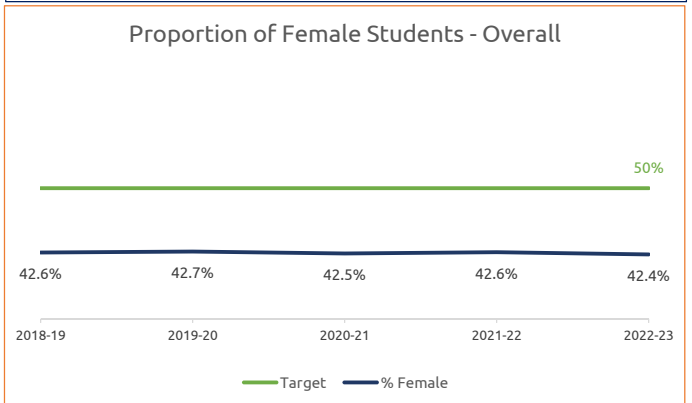
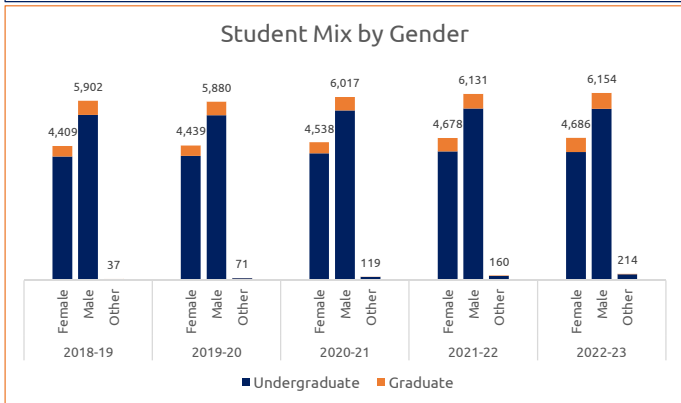
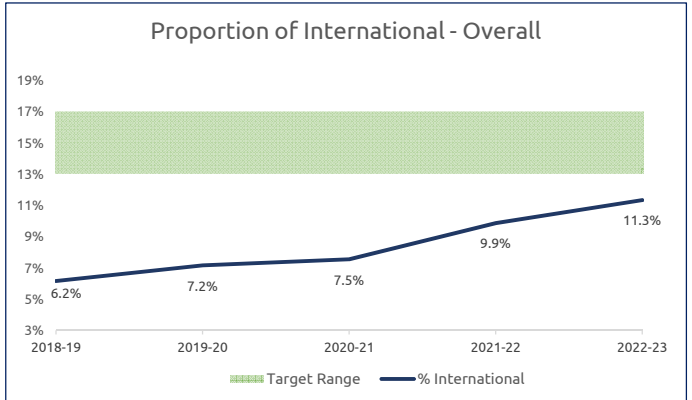
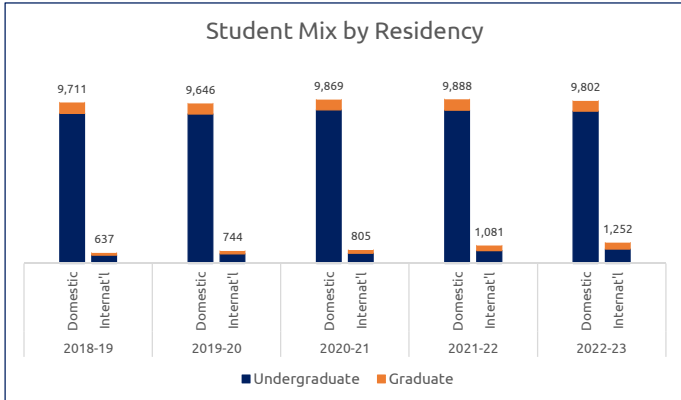
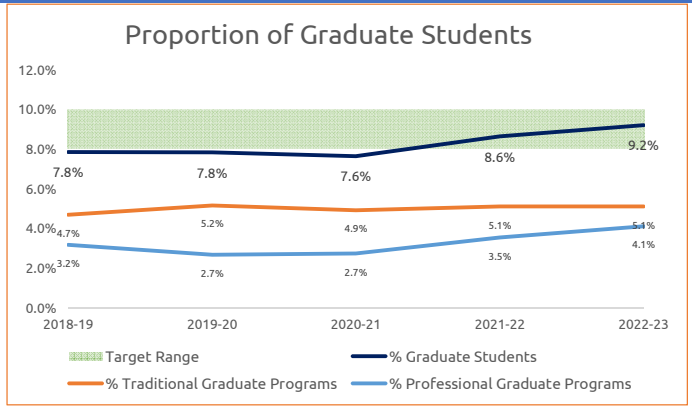
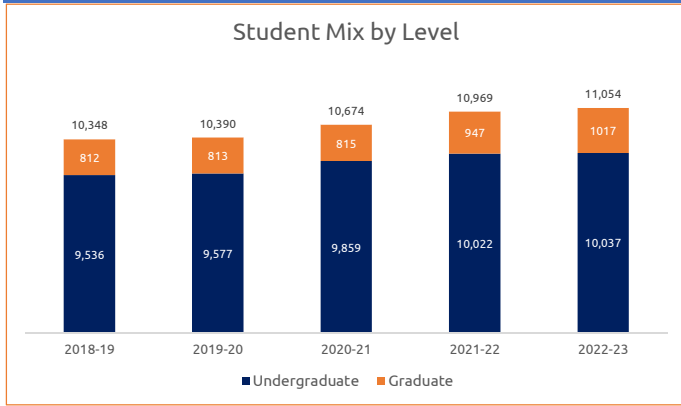
[Return to Metrics Listing](#)

Metric: **Student Mix - Overall**

Definition: Number and proportion of official student enrolment as reported by Ontario Tech University to the Ministry of Colleges and Universities. Overall Enrolment numbers include GR, PR and UG.

Data Source: University Statistical and Enrolment Report (USER) (Fall Report)

Target: Proportion of Graduate Students: between 8-10%  
 Proportion of International Students: 13-17% (15% by end of SMA) Proportion of Part-Time Students: 7-10%



# Ontario Tech University Metrics

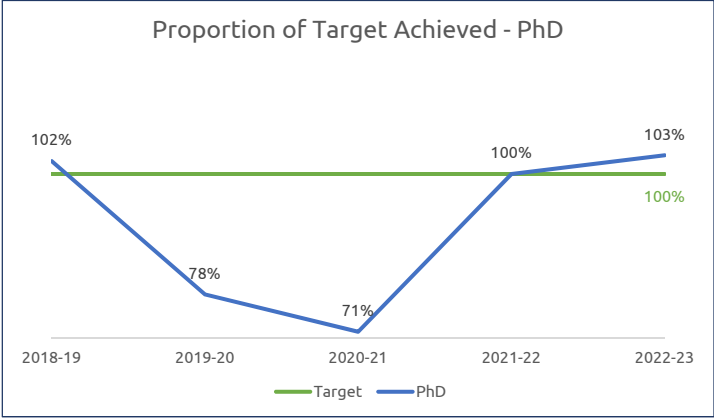
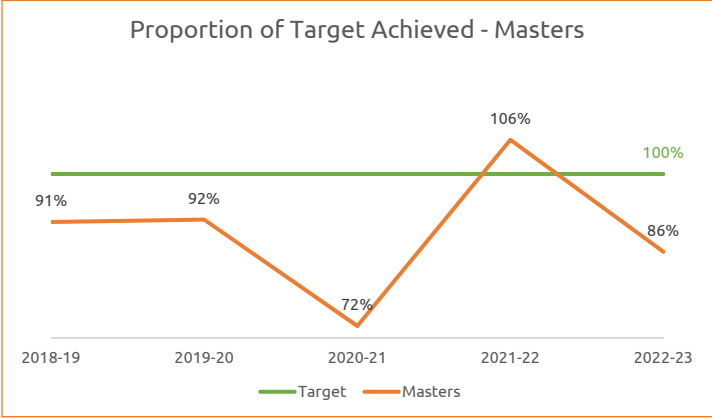
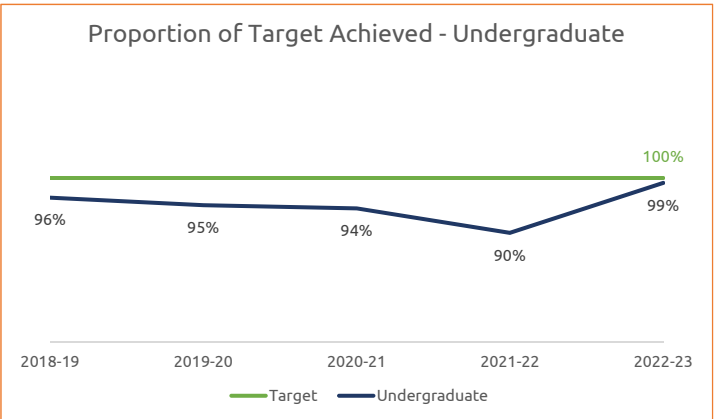
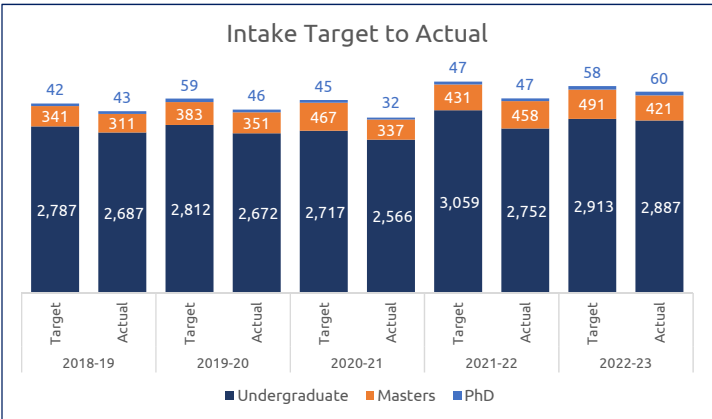
[Return to Metrics Listing](#)

Metric: **Enrolment Targets to Actual**

Definition: Comparison of the established Day 10 Enrolment Targets with the Day 10 Actual Enrolment, presenting the proportion of target achieved for Undergraduate, Masters, and PhD enrolment.

Data Source: Enrolment Targets, and Day 10 Enrolment Reports (UG: Fall, GR: Annual).

Target: 100% of Enrolment Targets Achieved



# Ontario Tech University Metrics

[Return to Metrics Listing](#)

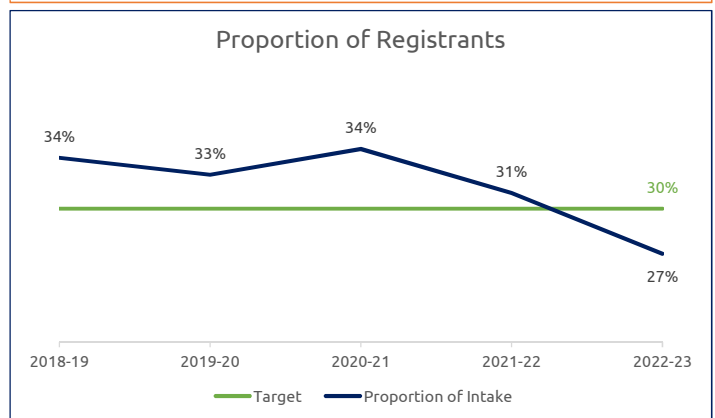
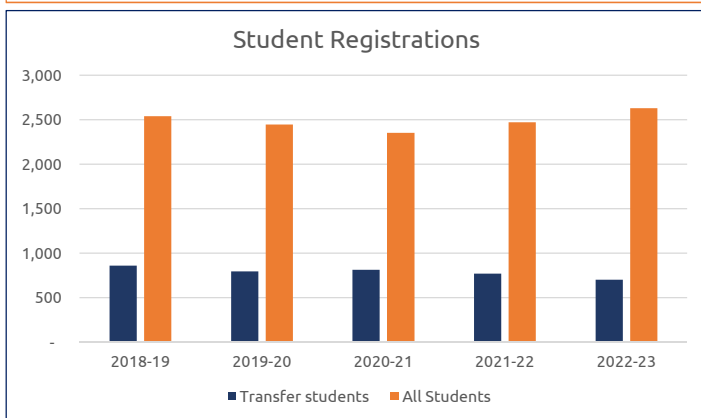
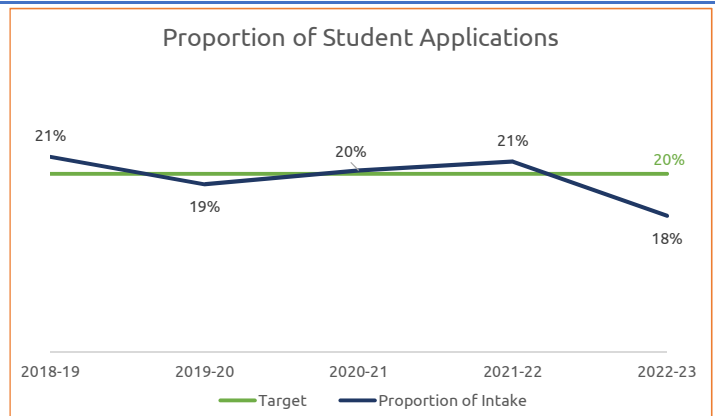
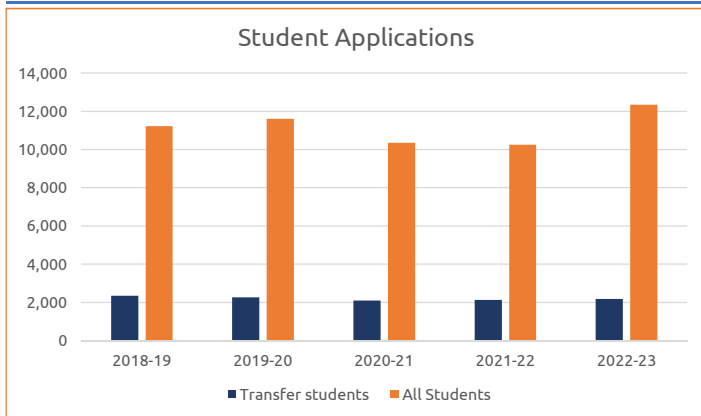
**Metric:** Transfer students from college and university

**Definition:** Number and proportion of UG transfer student applicants (from either another university or college) to overall new UG applicants.

Number and proportion of UG transfer student registrants (from either another university or college) to overall UG registrants.

**Data Source:** Day 10 Applicant Tracking Report and Official Fall USER report

**Target:** Maintain 30% of applications and 20% of registrations





# Ontario Tech University Metrics

[Return to Metrics Listing](#)

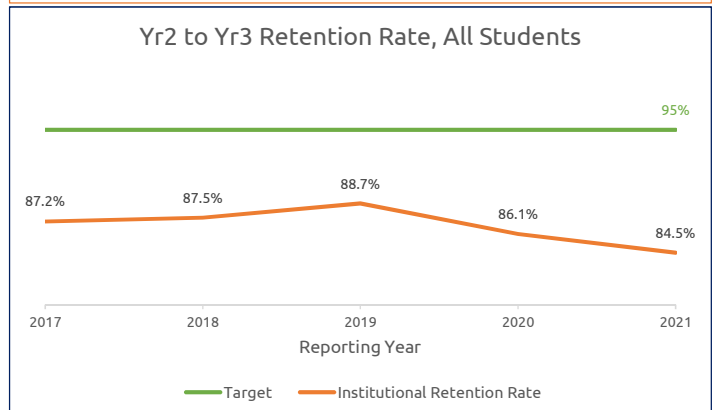
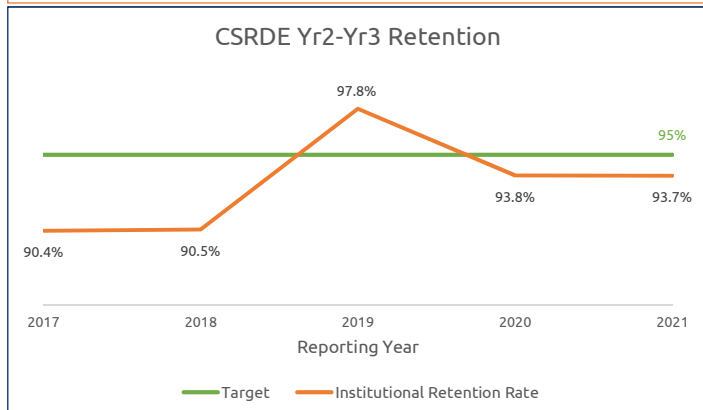
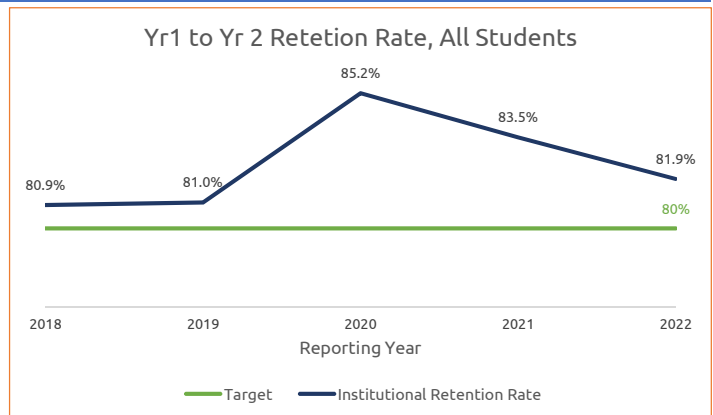
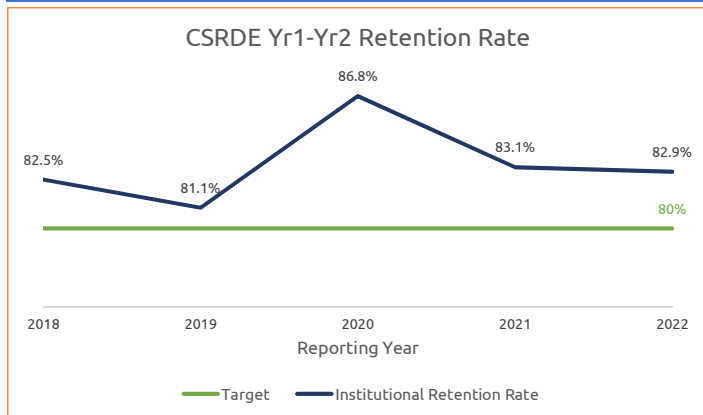
**Metric: Student Retention Rates**

**Definition:** Percentage of students who study in a given Fall term and have continued to study at the same institution in the next Fall term.

- CSRDE Year 1 to Year 2 Retention rates are based on first-time, full-time undergraduate students who commenced studies in the previous year and have continued to study at the same institution in the reporting year.
- All Year 1 to Year 2 Retention rates are based on all incoming Year 1 students who commenced studies in the previous year and have continued to study in the same institution in the reporting year.
- Applicable methodology applied to Year 2 to Year 3 Retention rates.

**Data Source:** Official Fall USER Reports

**Target:** CSRDE Year 1 to Year 2 Retention Rate: 80% or above  
 CSRDE Year 2 to Year 3 Retention Rate: 95%



# Ontario Tech University Metrics

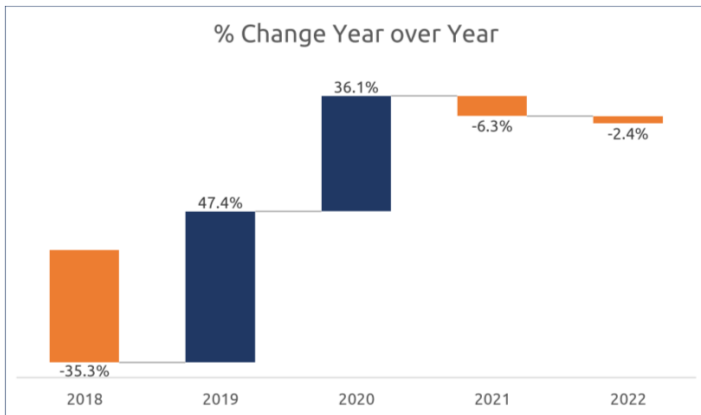
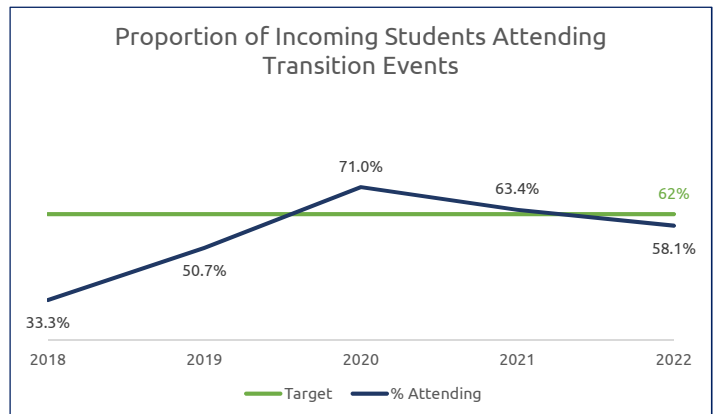
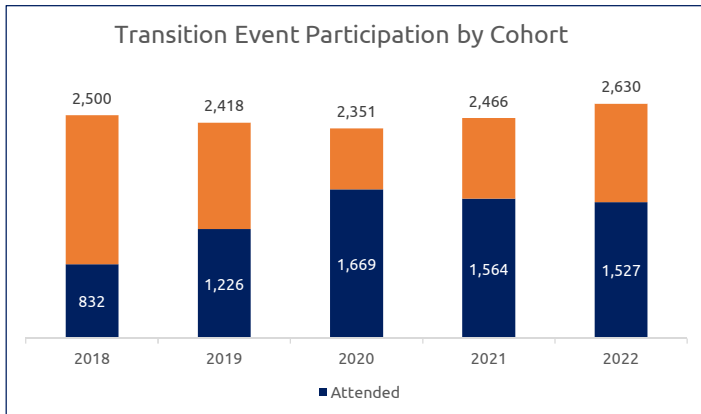
[Return to Metrics Listing](#)

**Metric:** Participation in New Student Transition Events

**Definition:** Distinct count and proportion of incoming UG students who attended one or more Transition Events (include Ridgeback Orientation, Ridgeback U, & MyStart)

**Data Source:** Students Life event attendance tracking reports, and overall new UG student counts (Fall USER)

**Target:** Proportion of Incoming Students (cohort) attending one or more Transition Events: 62% or above



MyStart is a series of online modules and live workshops that provide new students with a head start (both academically and an orientation to services and supports) in their university career. The program is offered throughout July and August to help students prepare for classes in September.

Ridgeback Orientation is the university's largest transition program specifically geared toward students who are beginning classes in September. This is a chance for students to connect with other new students, get familiar with their academic program, and get to know their way around campus. Scheduled activities provide fun and exciting opportunities for all incoming students to learn about the university's vibrant campus culture.

Ridgeback U is a yearly event that happens in July for incoming first year students that provides them and their supporters with the opportunity to experience the Ontario Tech community and prepare for September.

**Notes:**  
 2019 and prior: Orientation and MyStart were held fully in-person only.  
 2020: Orientation and MyStart were held fully online only.

# Ontario Tech University Metrics

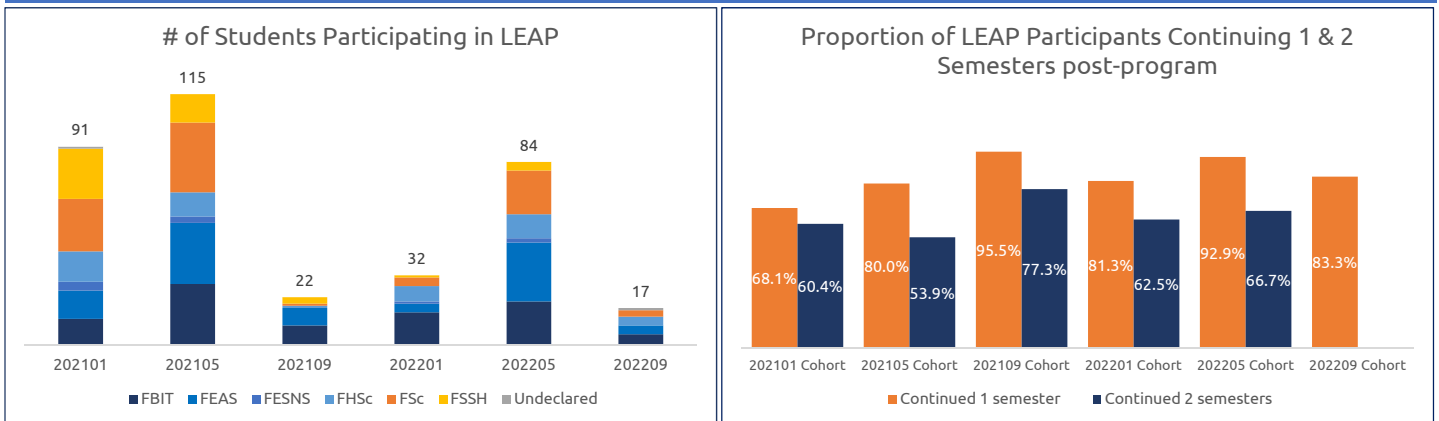
[Return to Metrics Listing](#)

Metric: **LEAP participation**

Definition: Post-program continuation of students who participated in and completed the LEAP program (count and proportion) term over term (one and two terms after program participation).

Data Source: LEAP course registration/grades and Annual USER data

Draft Target: Target will be set after 22-23, to allow for 3 yrs of data.



The Learner Engagement Academic Program (LEAP) program is a not-for-credit course aimed at giving students who have been suspended or dismissed the tools needed to successfully re-integrate into their program of study. LEAP combines the innovative principles of Burnett & Evans (2016) *Designing Your Life* with Covey's (2019) *7 Habits of Highly Effective People*. The highly interactive curriculum includes, but is not limited to, design thinking processes, learning opportunities specifically designed to provide participants with skills to ensure a successful transition back into our university community and beyond. Additionally, participants are expected to apply in-class hands-on activities with external experiential learning opportunities that include interactions with guest professionals, individual mentoring, and academic support. All of these components are delivered using multiple modalities that emulate those used in typical academic courses.

The program runs for 12 weeks and the content is delivered using a hybrid model (combination of in-person and virtual meetings, asynchronous material), as well as meeting with an academic coach. Successful completion of the program (i.e. achieving 70 per cent overall, successfully passing all components) is necessary in order to be re-admitted to the university.

# Ontario Tech University Metrics

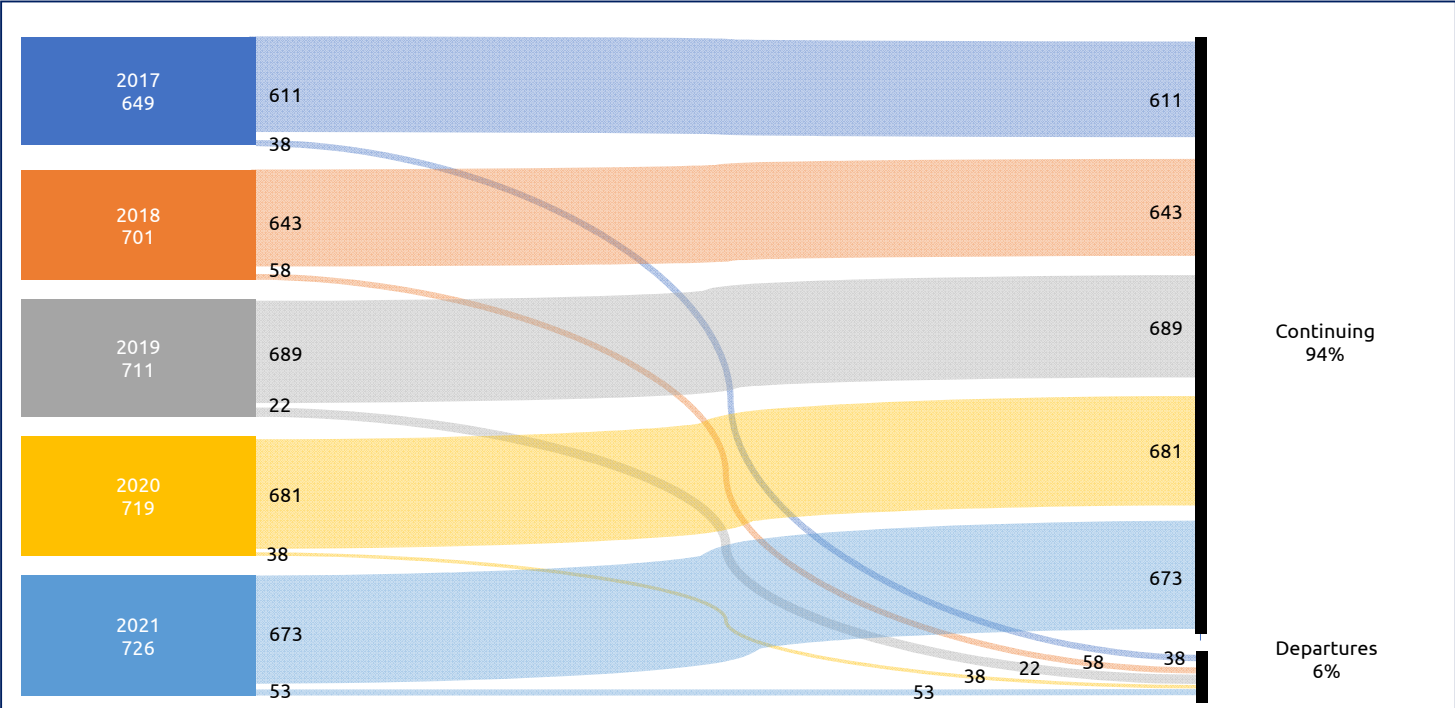
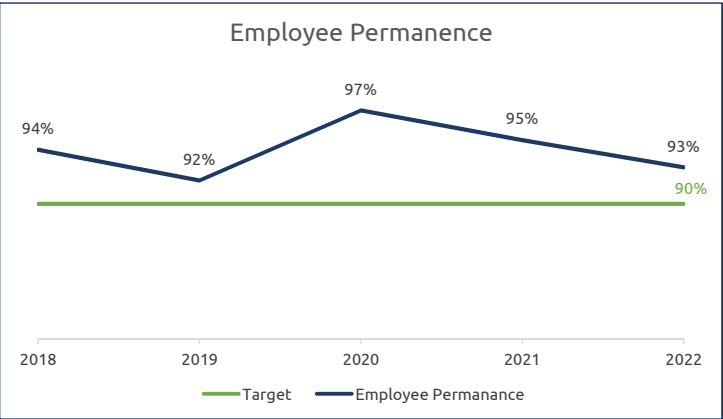
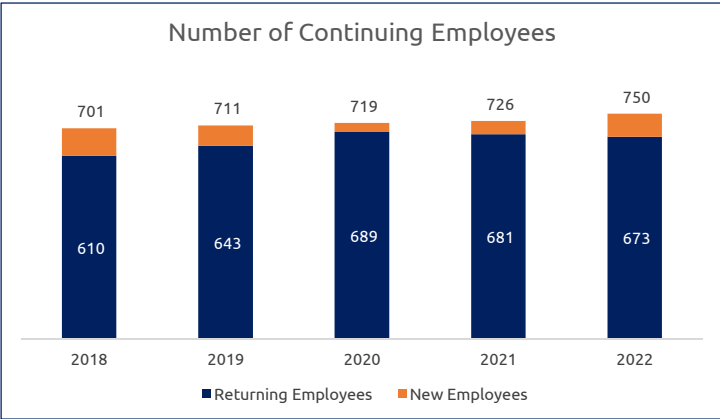
[Return to Metrics Listing](#)

Metric: **Employee Retention**

Definition: Number and proportion of employees that remain at Ontario Tech University from the previous year.

Data Source: Official Employee Counts made on October 1 of each year.

Target: Employee Permanence: above 90%



# Ontario Tech University Metrics

[Return to Metrics Listing](#)

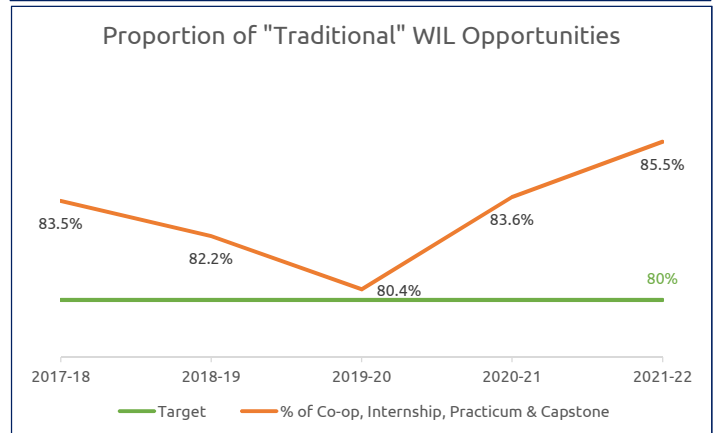
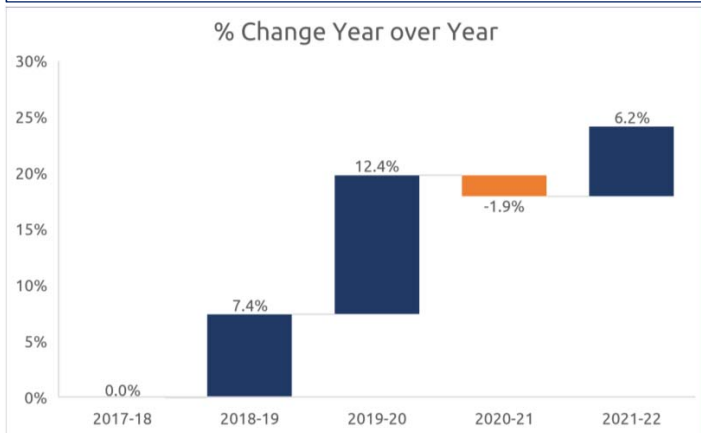
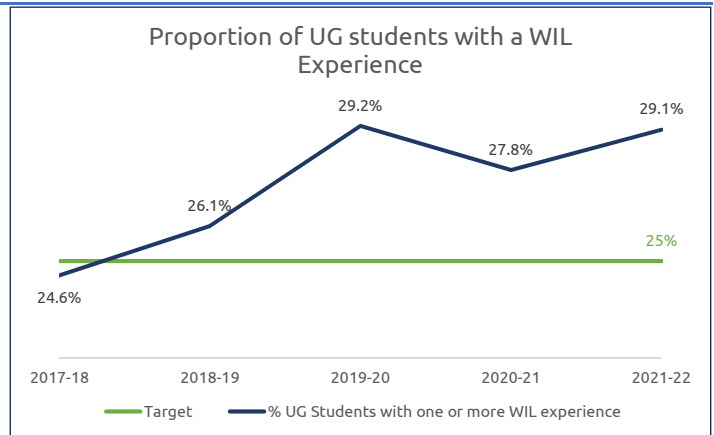
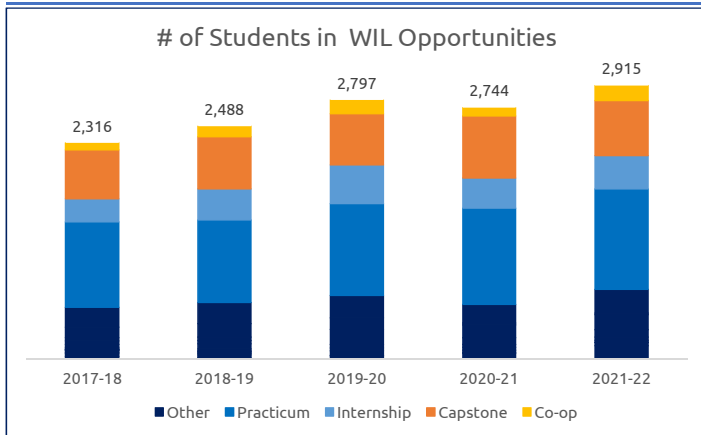
**Metric:** Student Participation in Working Intergated Learning (WIL) opportunities.

**Definition:** Distinct Count and Proportion of undergraduate students enrolled in one or more WIL opportunity including, but not limited to, the traditional experiences of Co-operative Education, Internships, Practicums, and Capstone Projects, reported for the Ministry Reporting year.

**Data Source:** Experiential Learning Database housed in the Office of Institutional Research and Analysis (OIRA).



**Target:** Proportion of Undergraduate Students participating in at least one WIL opportunity: 25% or higher  
Proportion of all WIL opportunities classified as a "Traditional WIL experience"(Co-op, Internship, Practicum, and Capstone): 80%



# Ontario Tech University Metrics

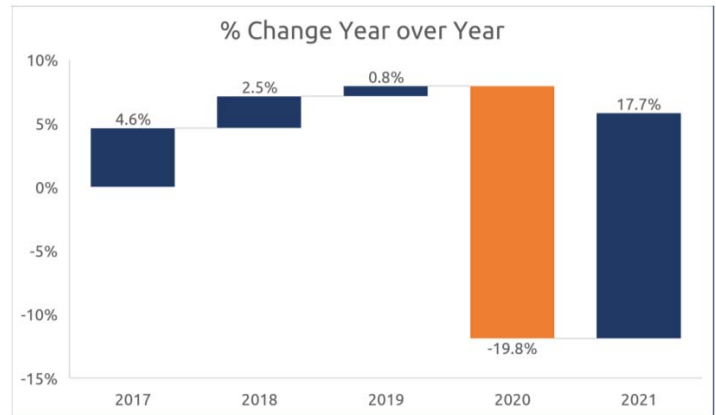
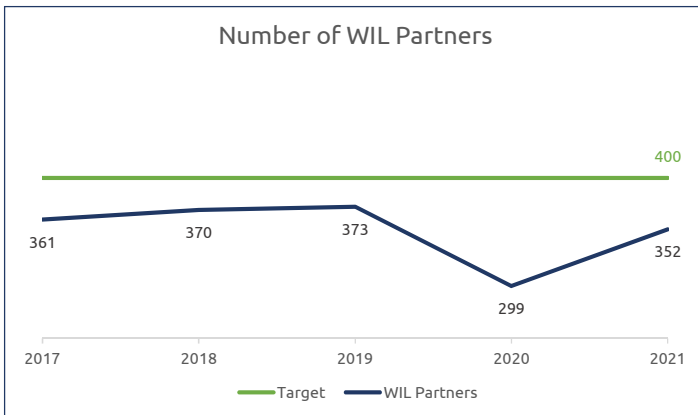
[Return to Metrics Listing](#)

Metric: **Partnerships in support Work Integrated Learning**

Definition: Distinct Count of partners supporting Work Integrated Learning included, but not limited to, Co-operative Education, Practicums, Internships, and Capstone projects. Note: Partner may have more than one project supporting WIL opportunities recorded for the Ministry Reporting year.

Data Source: Experiential Learning Database housed in the Office of Institutional Research and Analysis (OIRA).

Target: Number of Partners supporting WIL: 400



# Ontario Tech University Metrics

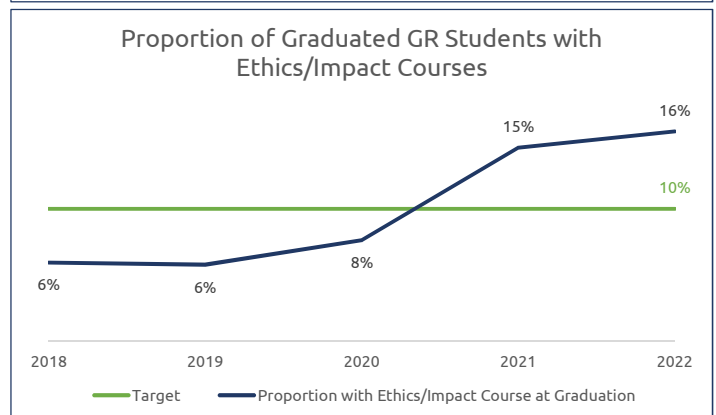
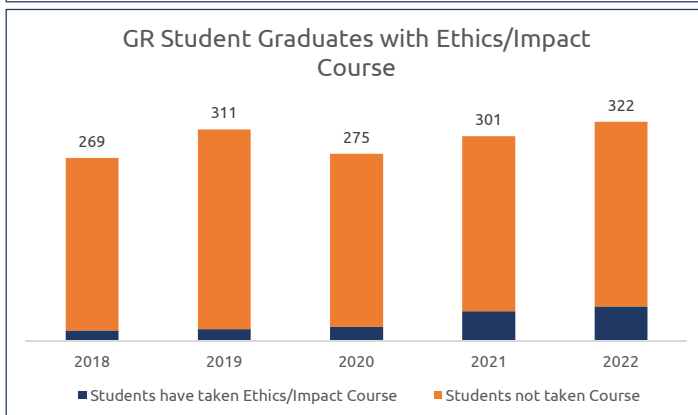
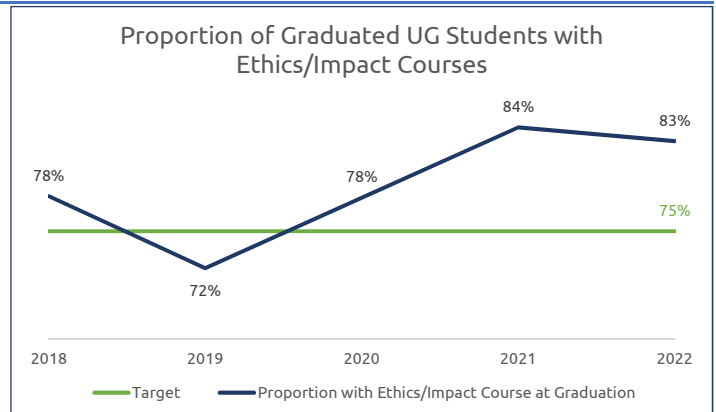
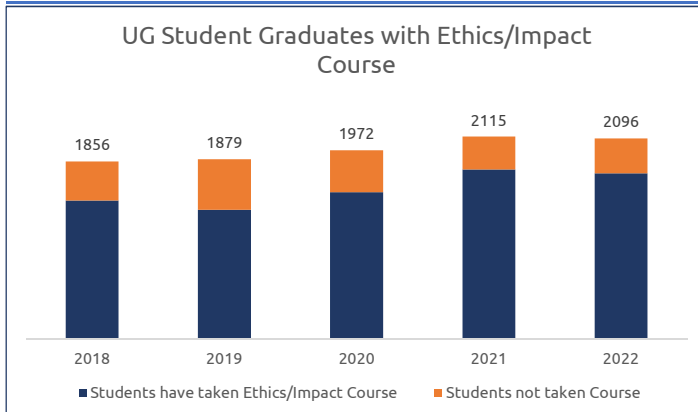
[Return to Metrics Listing](#)

**Metric:** Students graduating with a course on Ethics or Impact

**Definition:** Count and proportion of students, at time of graduation, who have taken in a course that has an ethical or impact component listed (indicated in course title within the Academic Calendar).

**Data Source:** Annual (Calendar Year) Graduation Census report, Student Registration Data Report

**Target:** Proportion of Undergraduate students graduating with at least one course with an Ethics or Impact component: 75%  
 Proportion of Graduate students graduating with at least one course with an Ethics or Impact component: 10%



# Ontario Tech University Metrics

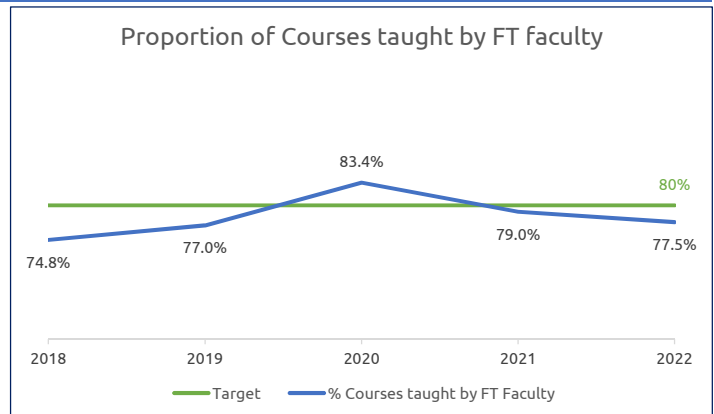
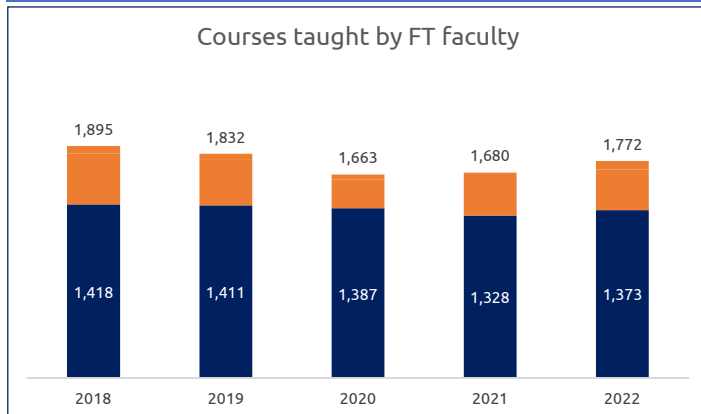
[Return to Metrics Listing](#)

Metric: **Courses taught by Full-time faculty**

Definition: Count and proportion of courses (CRN with credit hour weighting) taught by FT faculty members (Includes TTT, TF and Limited Term Faculty Members), per Ministry Reporting year.

Data Source: Course data and enrolment reports

Draft Target: Proportion of Courses taught by FT faculty members: 80%





# Ontario Tech University Metrics

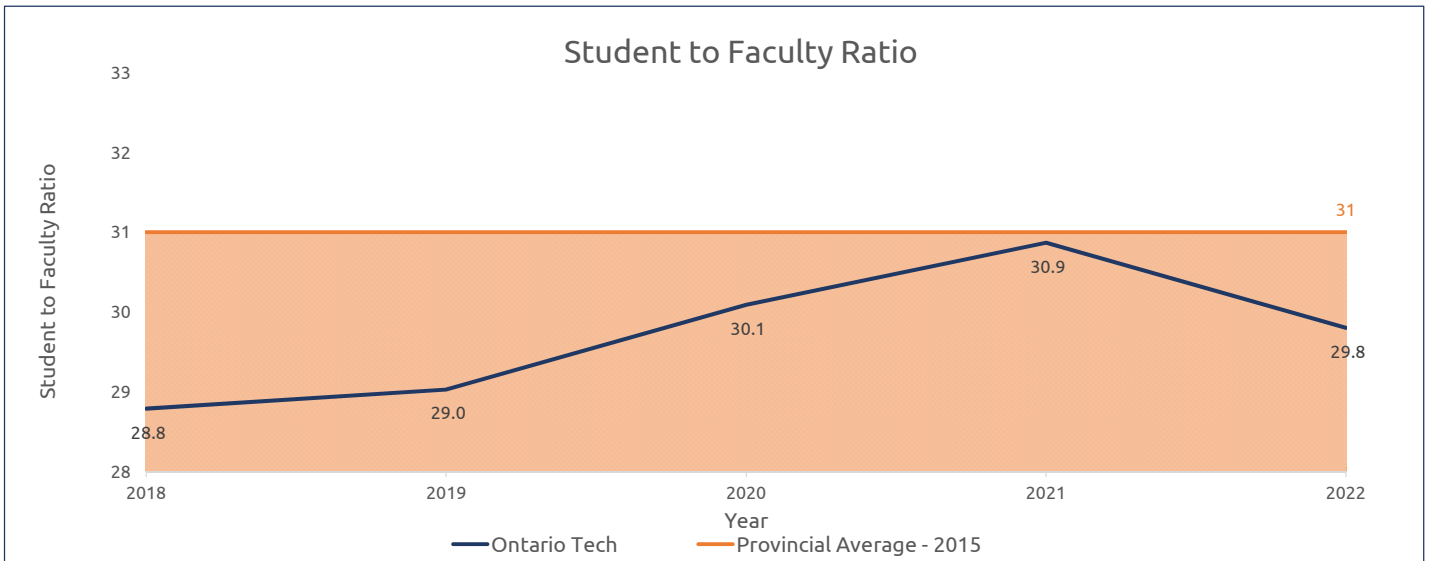
[Return to Metrics Listing](#)

Metric: **Student: Faculty ratios**

Definition: The ratio of students taught to number of academic teaching staff (TTT & TF). (Measure of FTE to FTE)

Data Source: Annual USER data and Official Human Resources counts as of October 1st of each year.

Target: 31 to 1 or better (2015 Provincial Average)



# Ontario Tech University Metrics

[Return to Metrics Listing](#)

Metric: **Overall Student Satisfaction**

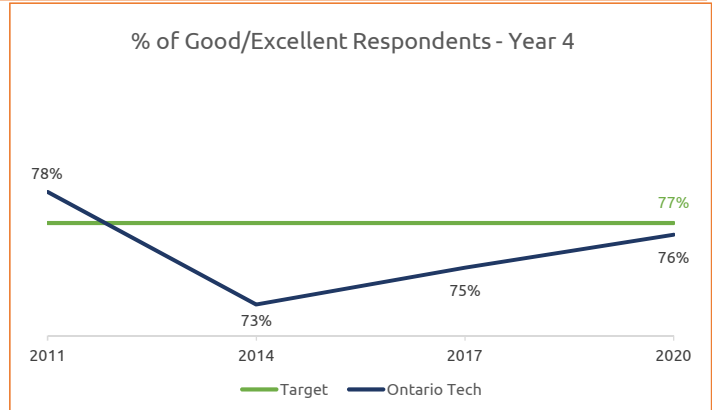
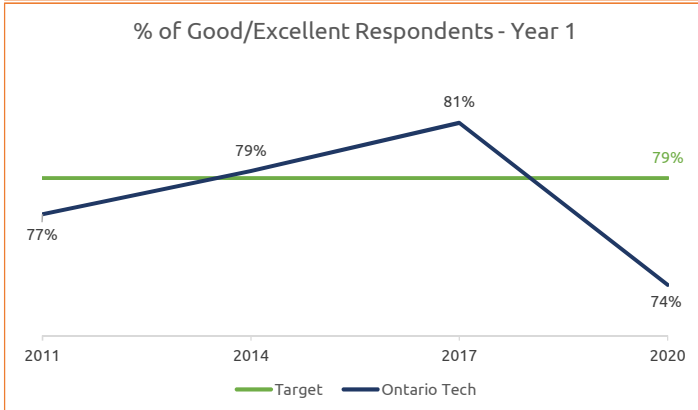
Definition: Reponse to NSSE questions on entire educational experience (% "good" or excellent" respondents) at Year 1 and Year 4

Data Source: National Survey of Student Engagement (NSSE); administered every 3 years to Year 1 and 4 Undergraduate students

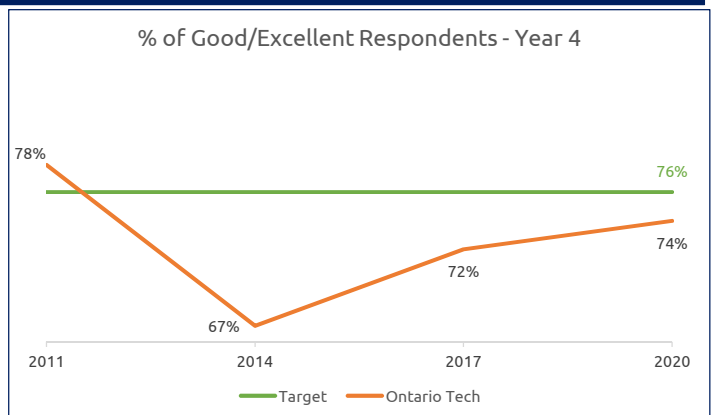
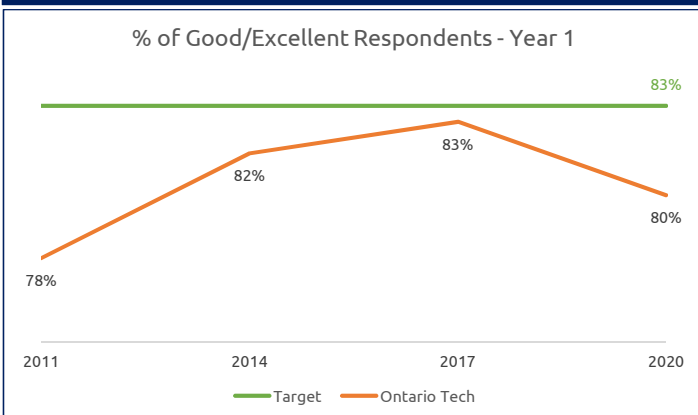
Target: Question 1 - Year 1: 79%, Year 4: 77%  
Question 2 - Year 1: 83%, Year 4: 76% (based on Provincial Averages)



## Question: How would you evaluate your entire educational experience at this institution?



## Question: If you could start over again, would you go to the same institution you are now attending?



# Ontario Tech University Metrics

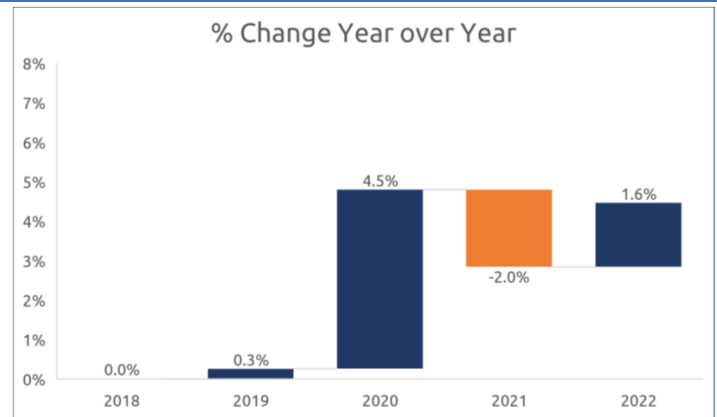
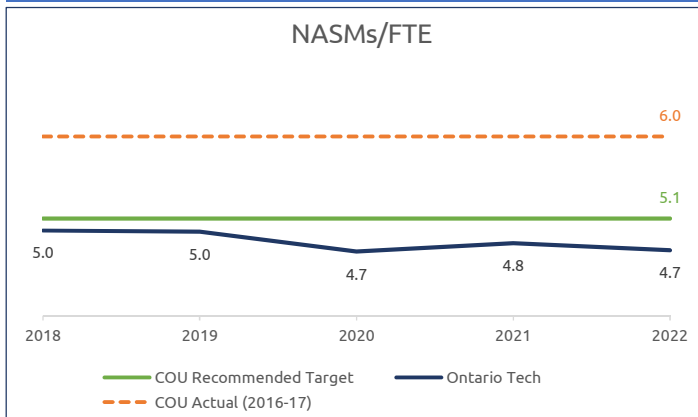
[Return to Metrics Listing](#)

Metric: **NASM/FTE ratio in instructional categories**

Definition: Ratio of Net Assignable Square Meters (NASM) of instructional space to Overall Student FTEs (COU methodology used)

Data Source: Official space database (OCIS), Annual USER data

Target: COU Recommended Target of 5.1



# Ontario Tech University Metrics

[Return to Metrics Listing](#)

Metric: **Flexible course formats offered (online or hybrid)**

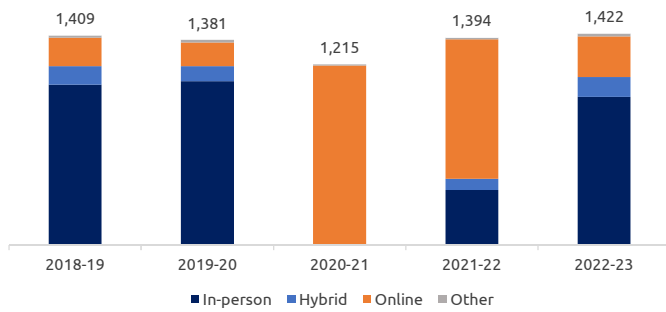
Definition: Count of In-person, Hybrid, Online, and Other undergraduate course offerings (\*Other includes "Offsite, Independent Study, N/A"). Proportion of undergraduate e-learning course offerings (hybrid/online).

Data Source: Official course scheduling and enrolment data (Ministry Reporting year)

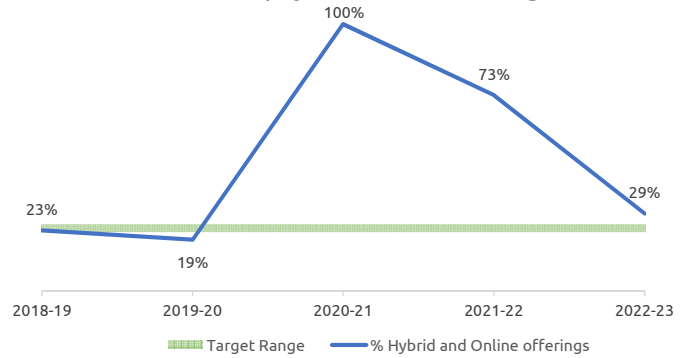
Target: Proportion of online/hybrid undergraduate course offerings: between 22-25%



### Course Offerings by Instructional Method



### % of Online/Hybrid Course Offerings



# Ontario Tech University Metrics

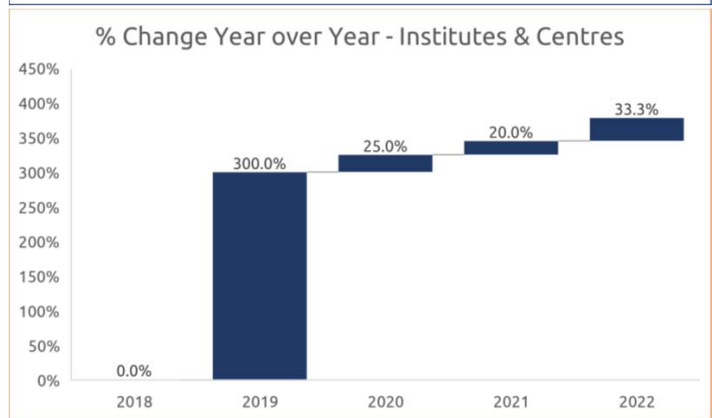
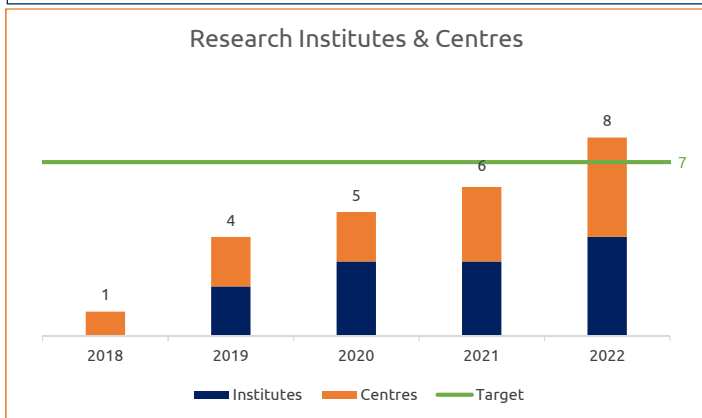
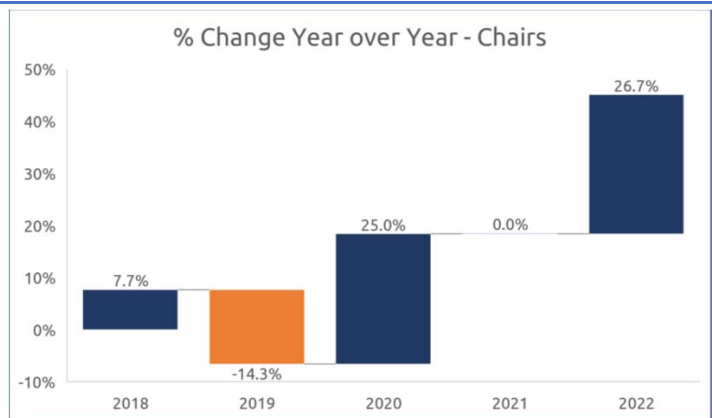
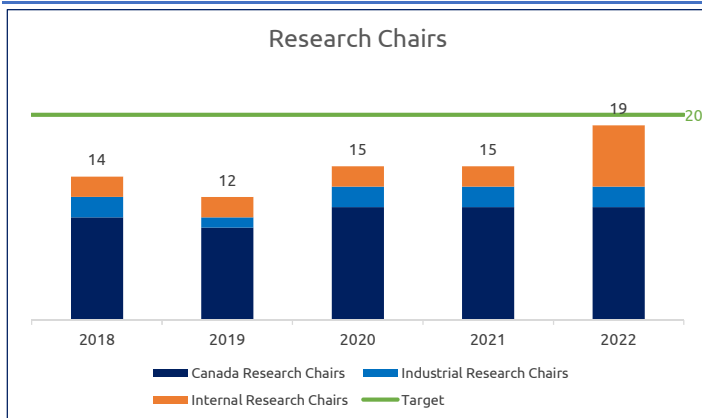
[Return to Metrics Listing](#)

Metric: **Research Chairs & Institutes**

Definition: Count of Research Chairs, Institutes, and Centres, by year. Includes internal, CRC, and industry chairs.

Data Source: Office of Research Services

Draft Target: Count of Research Chairs: 20  
Count of Research Institutes and Centres: 7



# Ontario Tech University Metrics

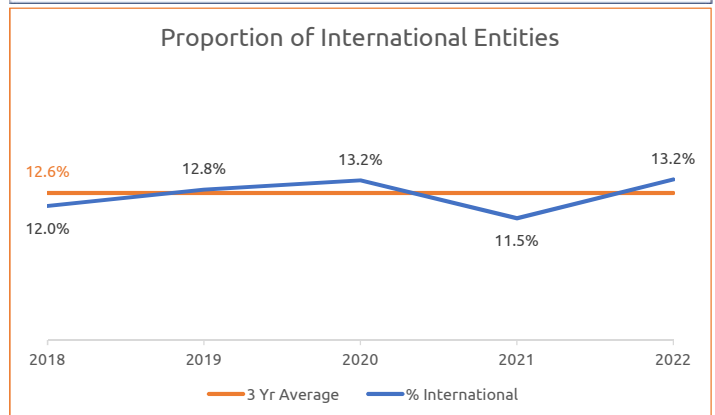
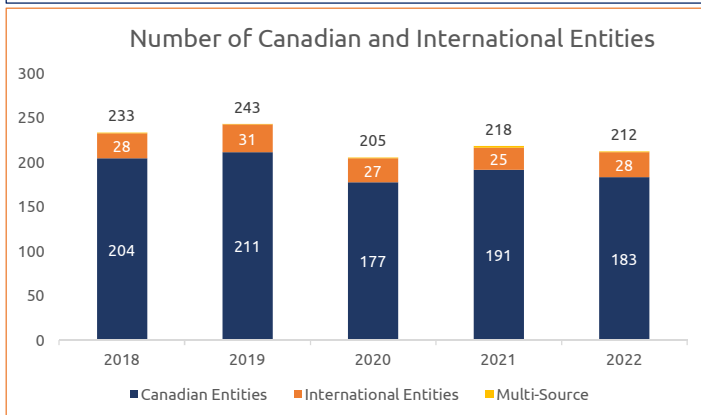
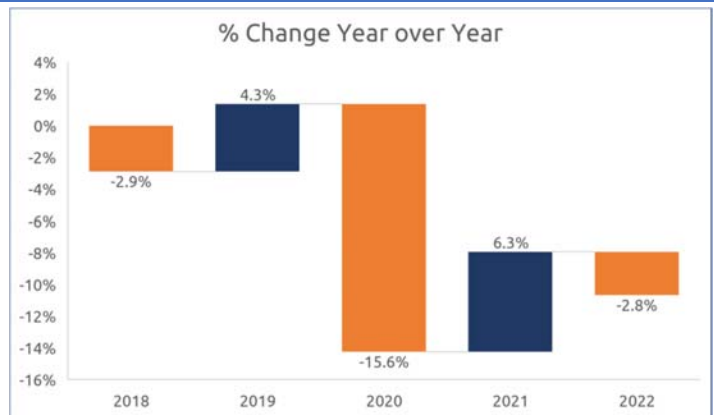
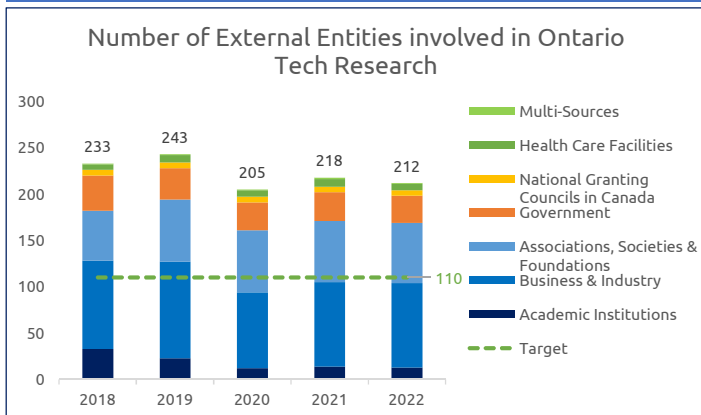
[Return to Metrics Listing](#)

Metric: **Research Sponsorships**

Definition: Count of external entities involved in sponsored research with Ontario Tech U. per fiscal year. Each entity is shown only once per year, regardless of how many projects they are involved in. However, an entity can be repeated in more than one fiscal year if they disbursed in more than one fiscal year.

Data Source: Office of Research Services

Target: Number of external entities involved in sponsored research: 110



# Ontario Tech University Metrics

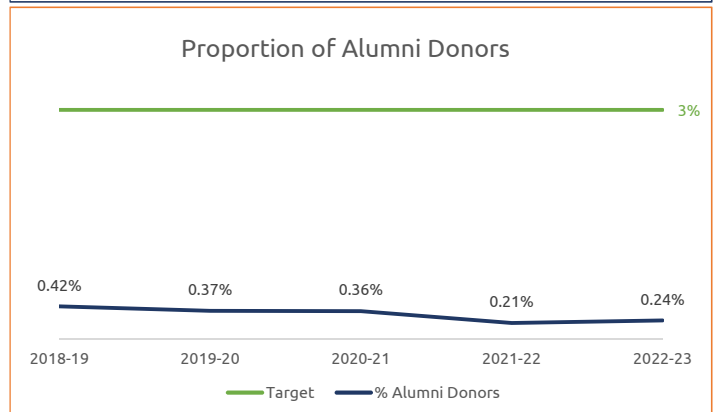
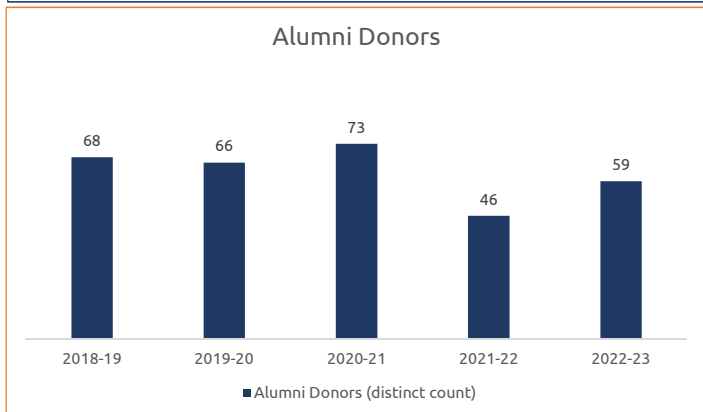
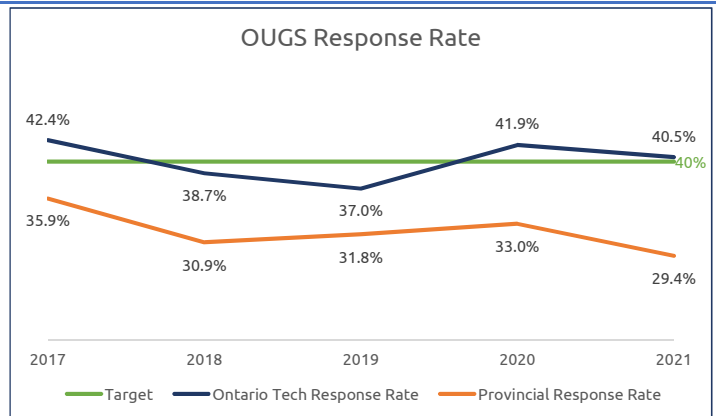
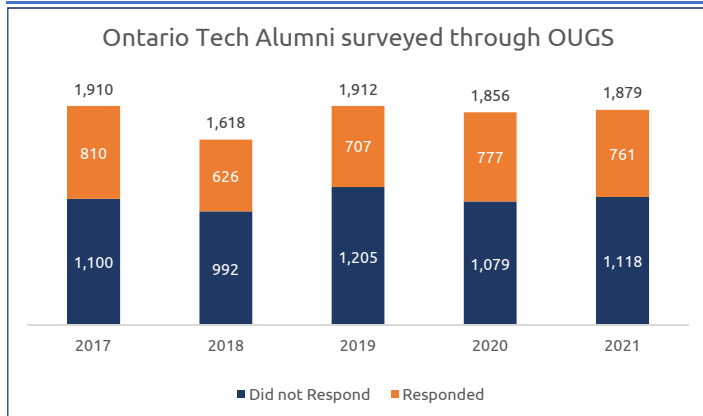
[Return to Metrics Listing](#)

Metric: **Alumni Engagement**

Definition: Proportion of eligible alumni who responded to Ontario University Graduate Survey (OUGS) (administered two years after graduating from an undergraduate or first professional degree program). Proportion of alumni donors per fiscal year (unique donors against rolling distinct count of total alumni).

Data Source: OUGS survey response data, Student Graduation Reports, donor records maintained by the Advancement and Alumni Office

Target: Engagement rate on OUGS: 40%  
Engagement rate on Alumni donors: 3%



# Ontario Tech University Metrics

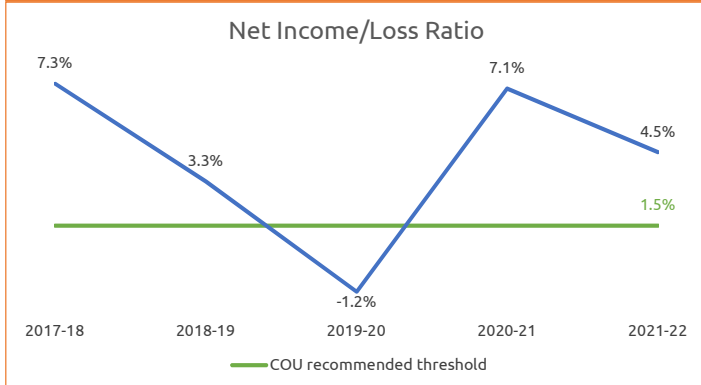
[Return to Metrics Listing](#)

Metric: **Economic Stewardship**  
 Definition: As provided below  
 Data Source: Finance

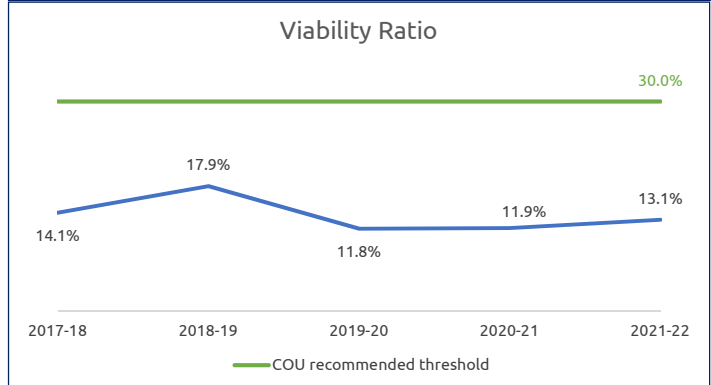
Target: COU recommended thresholds.  
 Net Income/Loss Ratio: 1.5%  
 Primary Reserve Ratio: 30

Viability Ratio: 30%  
 Net Operating Revenues Ratio: 2.0%

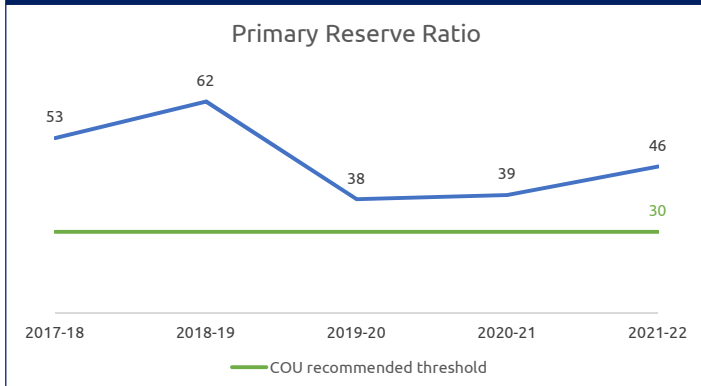
The Net Income/Loss Ratio measures the percentage of revenues that contributes to net assets. The objective of this ratio is to track trends in net earnings.



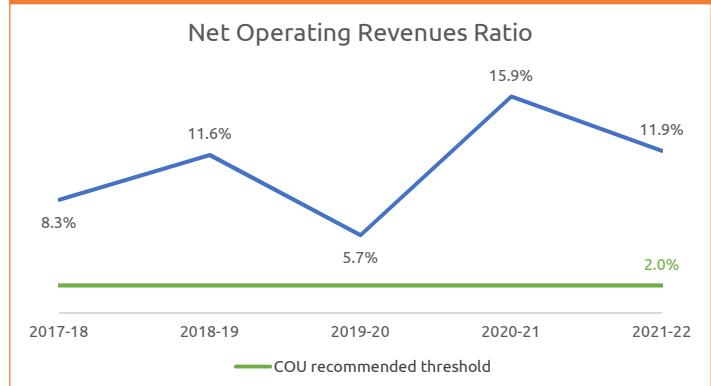
The Viability Ratio is a basic determinant of an institution's financial health, as it provides an indication of the funds on hand that can be used should an institution need to settle its long-term obligations.



The Primary Reserve Ratio is a measure of financial viability that compares expendable net assets to total expenses by determining how many days an institution could function using only its financial resources that can be



The Net Operating Revenues Ratio is a financial performance metric that provides an indication of the extent to which institutions are generating positive cash flows in the long run to be financially sustainable.



Credit Rating	Moody's	DBRS
2017-18	A1 Stable	A(low) Stable
2018-19	A1 Stable	A(low) Stable
2019-20	A1 Stable	A(low) Stable
2020-21	A1 Stable	A(low) Stable
2021-22	A1 Stable	A(low) Stable

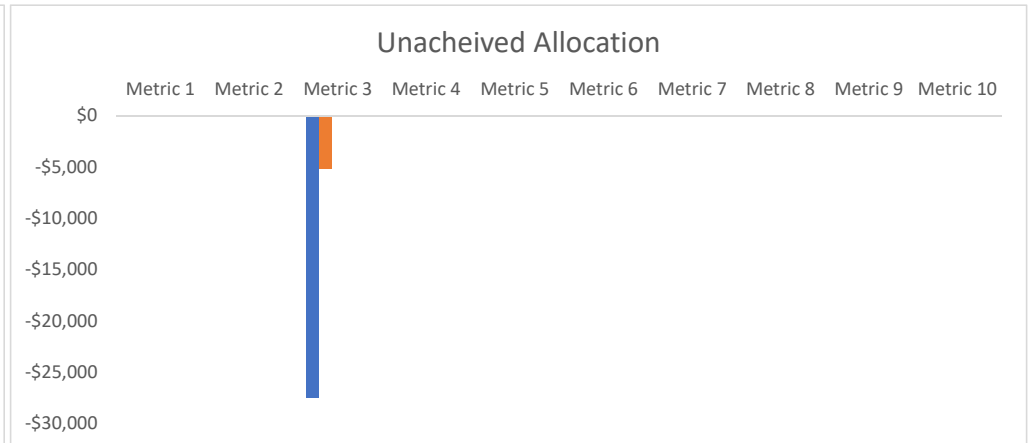
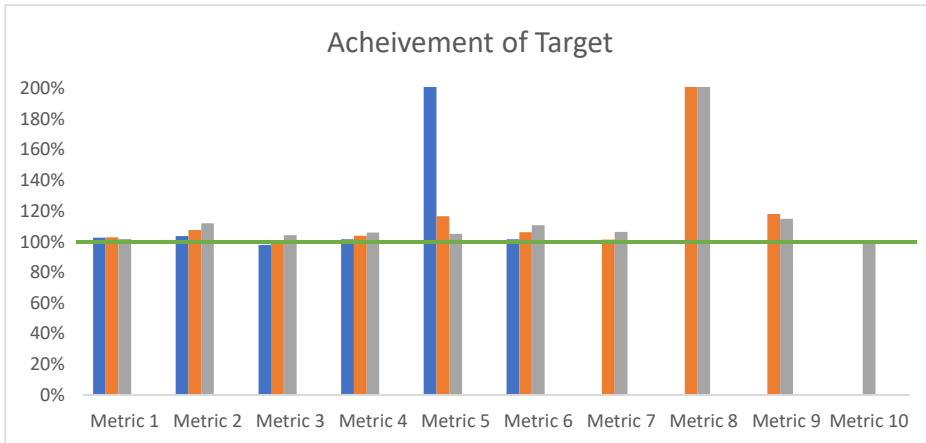
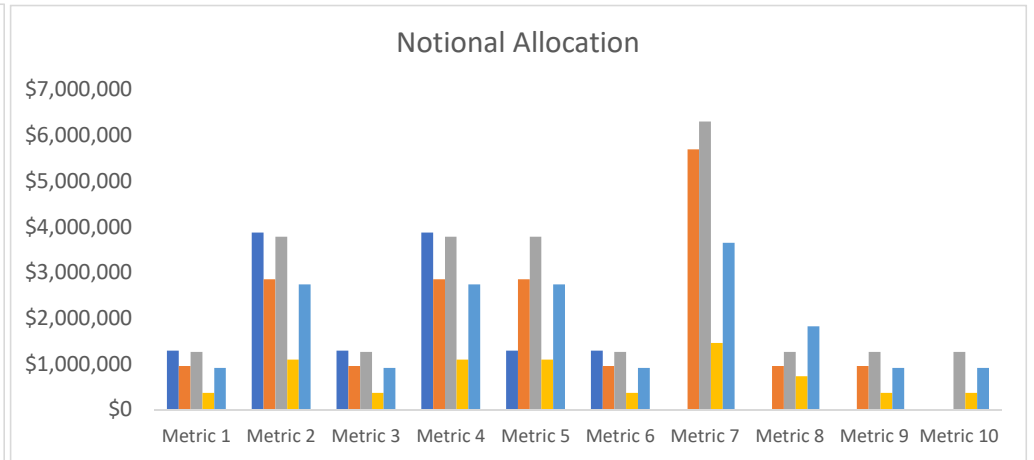
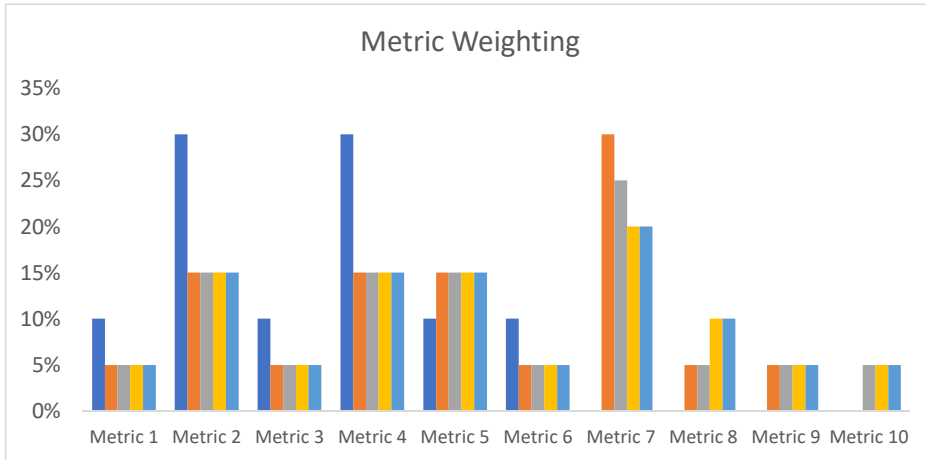


# SMA Dashboard - Year 3 Reporting

2020-21 2021-22 2022-23 2023-24 2024-25

- Metric 1: Graduate Employment Rate in a Related Field**
- Metric 2: Institutional Strength/Focus**
- Metric 3: Graduation Rate**
- Metric 4: Community/Local Impact of Student Enrolment**
- Metric 5: Economic Impact (Institution-specific)**

- Metric 6: Research Funding and Capacity: Federal Tri-Agency Funding Secured**
- Metric 7: Experiential Learning**
- Metric 8: Research Revenue Attracted from Private Sources**
- Metric 9: Graduate Employment Earnings**
- Metric 10: Skills and Competencies**



Note: Metrics 1-6 active during Year 1 (2020-21)  
 Metrics 1-9 active during Year 2 (2021-22)  
 Metrics 1-10 active during Year 3 (2022-23) and forward

Data not appearing indicates full allocation achieved

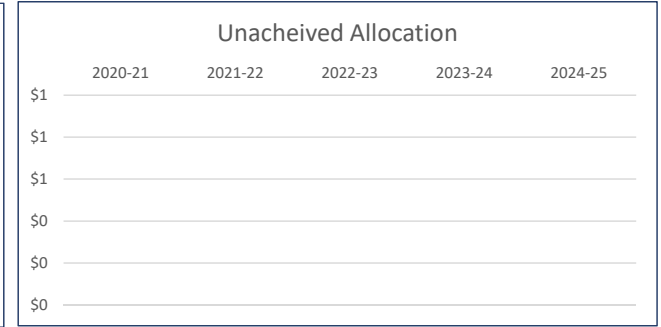
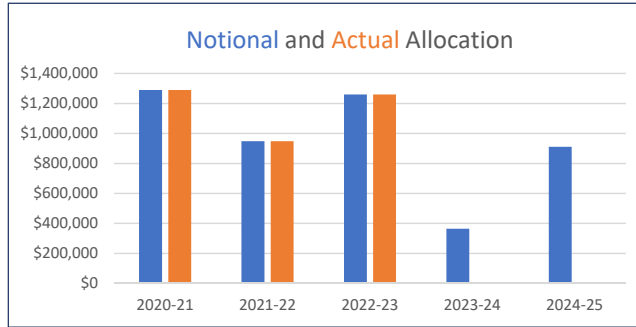
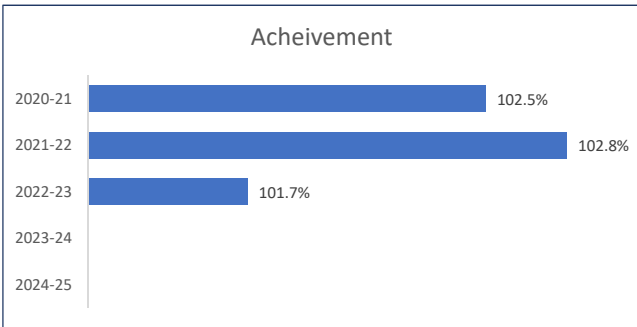
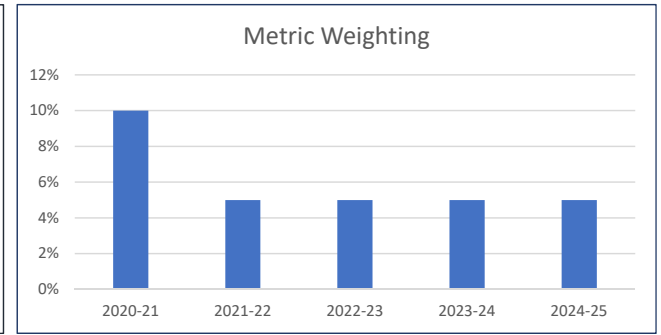
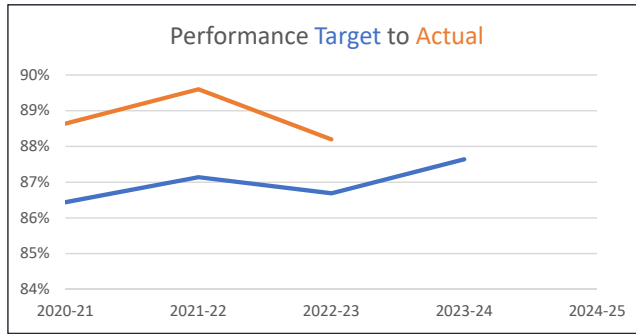
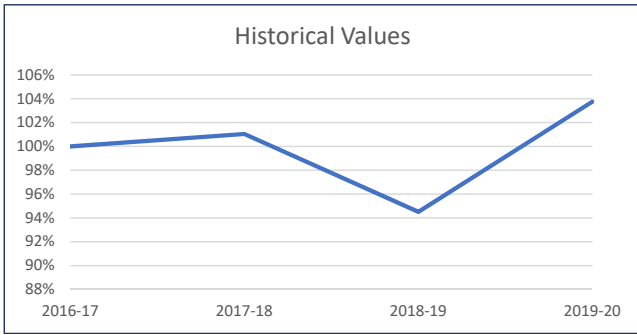
Graduate Employment Rate in a Related Field	Institutional Strength/Focus
Graduation Rate	Community/Local Impact of Student Enrolment
Economic Impact (Institution-specific)	Research Funding and Capacity: Federal Tri-Agency Funding Secured
Experiential Learning	Research Revenue Attracted from Private Sources
Graduate Employment Earnings	Skills & Competencies (Institution-specific)

**Definition**

Proportion of graduates of undergraduate (bachelor or first professional degree) programs employed full-time who consider their jobs either “closely” or “somewhat” related to the skills they developed in their university program, two years after graduation.

**Data Source**

MCU Ontario University Graduate Survey (OUGS)



Note: Metrics 1-6 active during Year 1 (2020-21)  
 Metrics 1-9 active during Year 2 (2021-22)  
 Metrics 1-10 active during Year 3 (2022-23) and forward

data not appearing indicates full allocation achieved

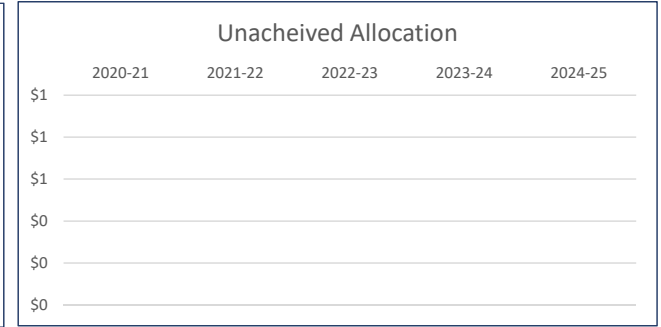
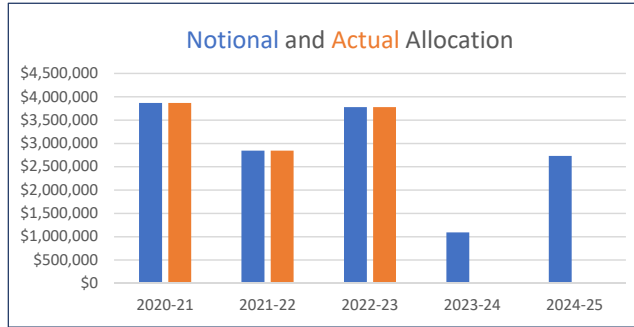
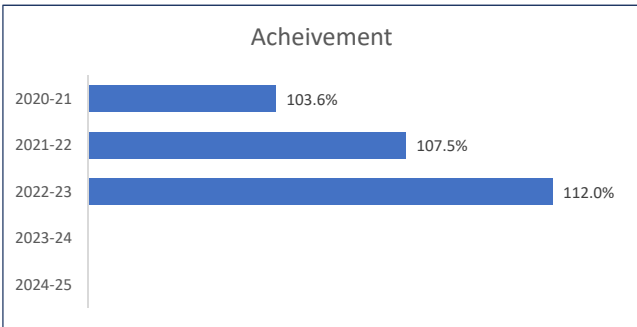
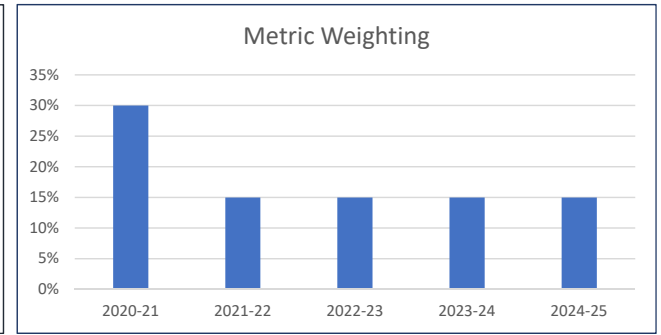
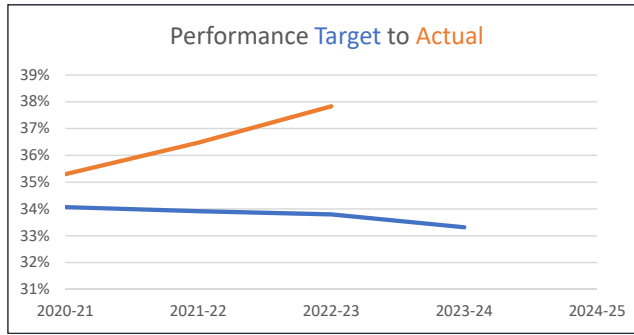
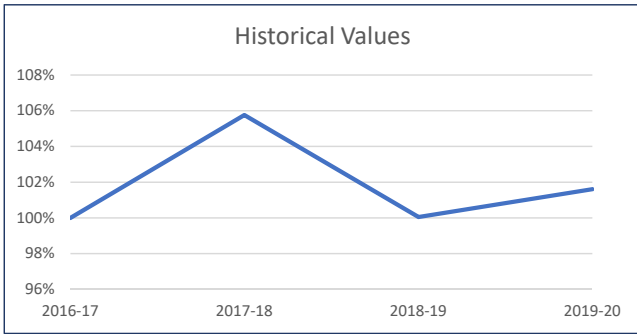
Graduate Employment Rate in a Related Field	Institutional Strength/Focus
Graduation Rate	Community/Local Impact of Student Enrolment
Economic Impact (Institution-specific)	Research Funding and Capacity: Federal Tri-Agency Funding Secured
Experiential Learning	Research Revenue Attracted from Private Sources
Graduate Employment Earnings	Skills & Competencies (Institution-specific)

**Definition**

Proportion of enrolment in an institution's program area(s) of strength.

**Data Source**

University Statistical and Enrolment Report (USER), Enrolment data collection



Note: Metrics 1-6 active during Year 1 (2020-21)  
 Metrics 1-9 active during Year 2 (2021-22)  
 Metrics 1-10 active during Year 3 (2022-23) and forward

Data not appearing indicates full allocation achieved

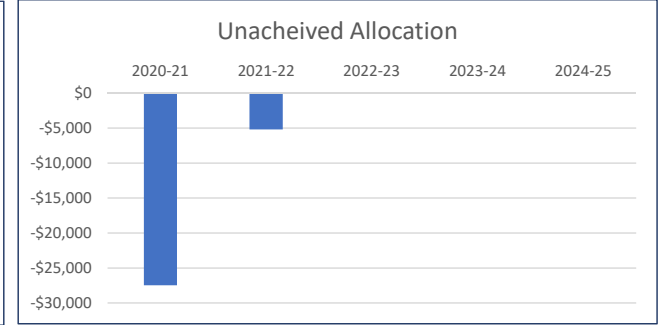
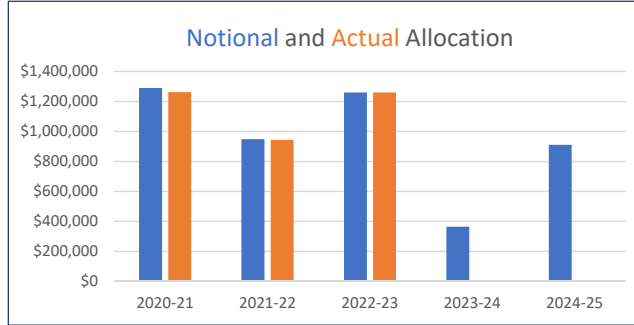
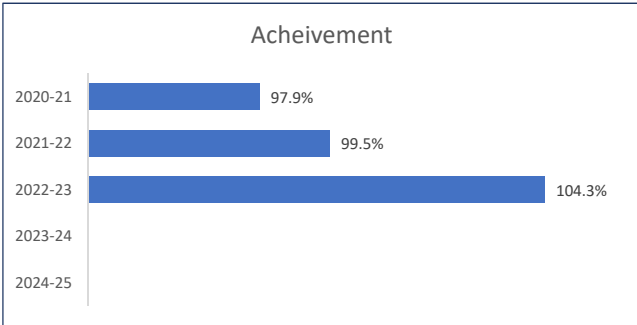
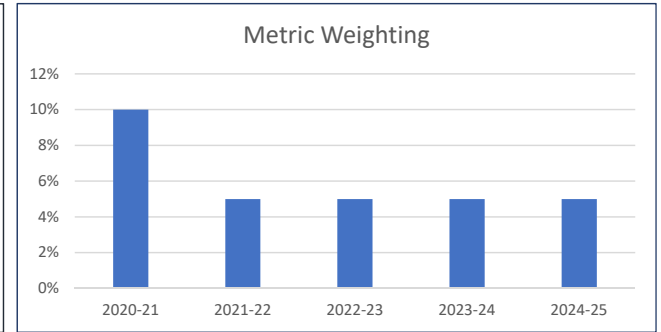
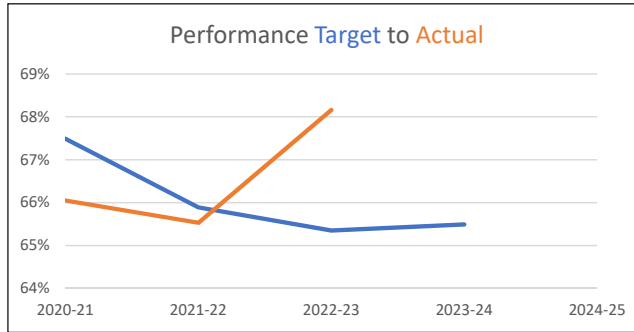
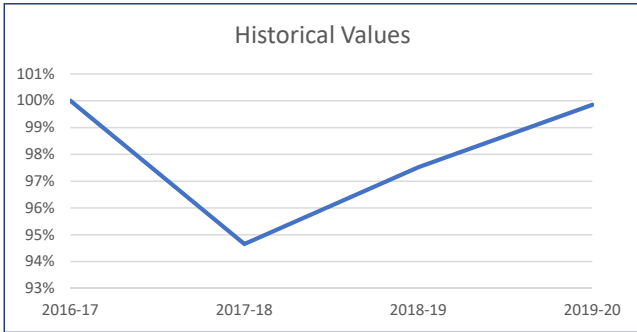
Graduate Employment Rate in a Related Field	Institutional Strength/Focus
<b>Graduation Rate</b>	Community/Local Impact of Student Enrolment
Economic Impact (Institution-specific)	Research Funding and Capacity: Federal Tri-Agency Funding Secured
Experiential Learning	Research Revenue Attracted from Private Sources
Graduate Employment Earnings	Skills & Competencies (Institution-specific)

**Definition**

Proportion of all new, full-time, year one university students of undergraduate (bachelor or first professional degree) programs who commenced their study in a given fall term and graduated from the same institution within 7 years.

**Data Source**

University Statistical and Enrolment Report (USER) - Enrolment and Degrees Awarded data collections



Note: Metrics 1-6 active during Year 1 (2020-21)  
 Metrics 1-9 active during Year 2 (2021-22)  
 Metrics 1-10 active during Year 3 (2022-23) and forward

data not appearing indicates full allocation achieved

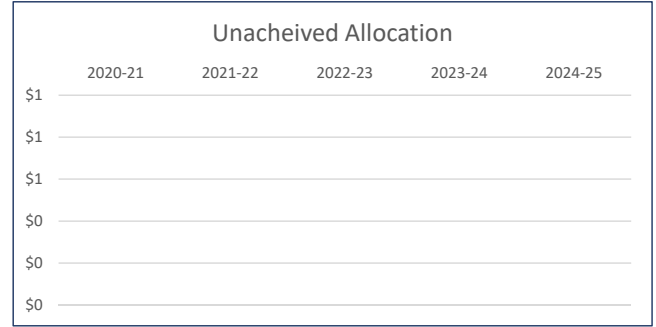
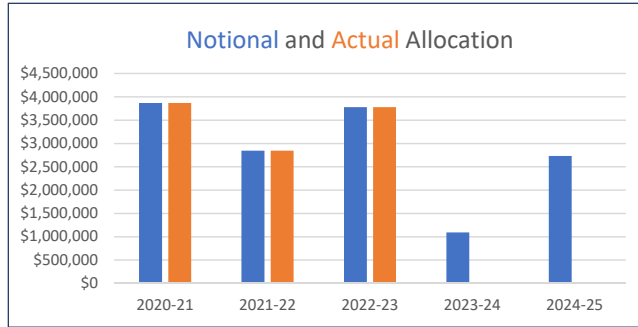
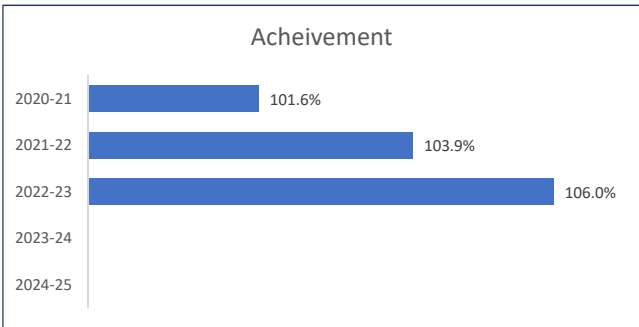
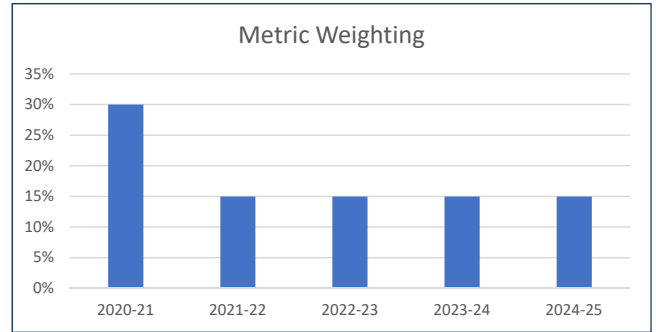
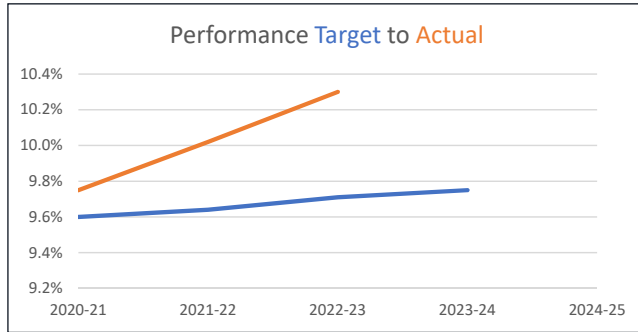
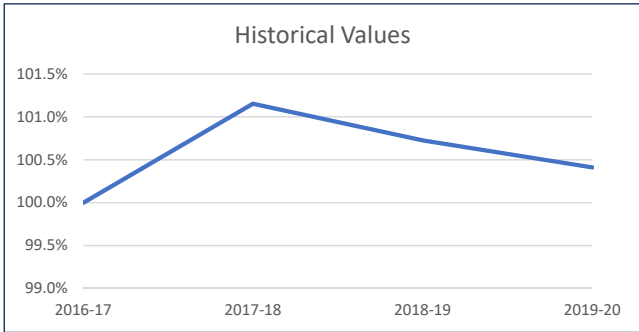
Graduate Employment Rate in a Related Field	Institutional Strength/Focus
Graduation Rate	Community/Local Impact of Student Enrolment
Economic Impact (Institution-specific)	Research Funding and Capacity: Federal Tri-Agency Funding Secured
Experiential Learning	Research Revenue Attracted from Private Sources
Graduate Employment Earnings	Skills & Competencies (Institution-specific)

**Definition**

Institutional enrolment share in the population of the city (cities)/town(s) in which the institution is located.

**Data Source**

University Statistical Enrolment Report (USER), Enrolment data collection; Census Data (Statistics Canada)



Note: Metrics 1-6 active during Year 1 (2020-21)  
 Metrics 1-9 active during Year 2 (2021-22)  
 Metrics 1-10 active during Year 3 (2022-23) and forward

data not appearing indicates full allocation achieved

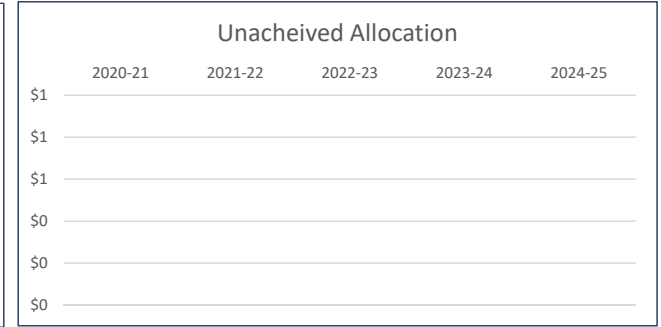
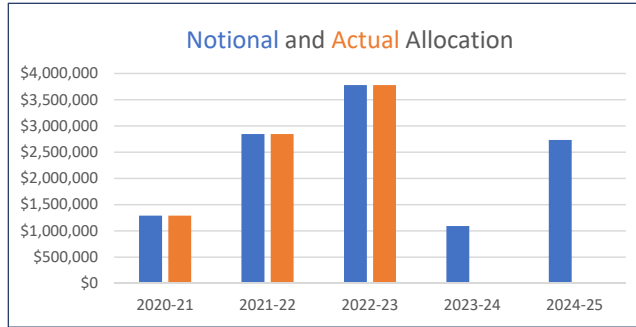
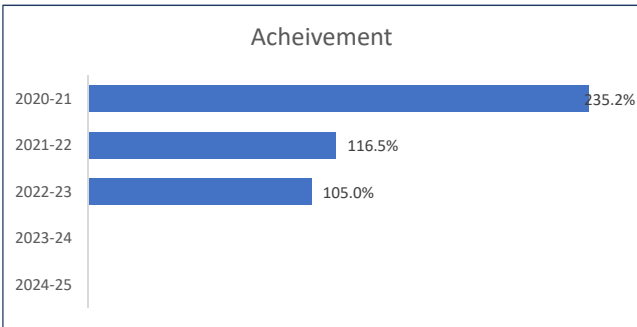
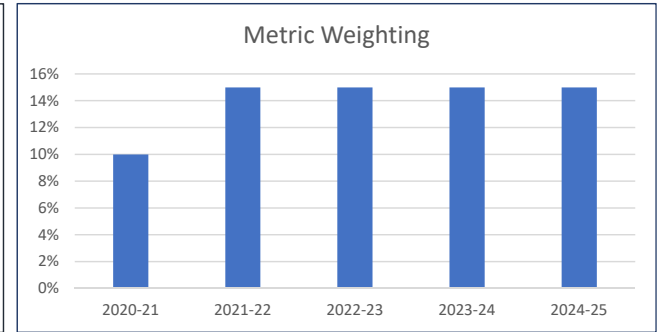
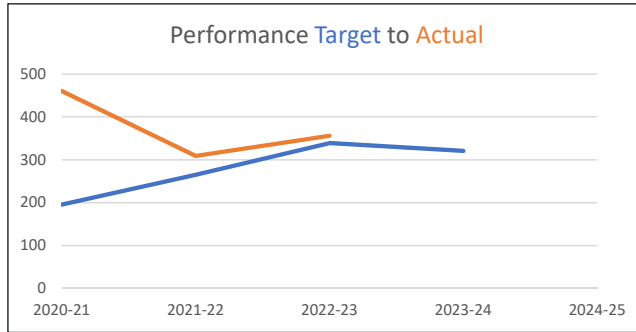
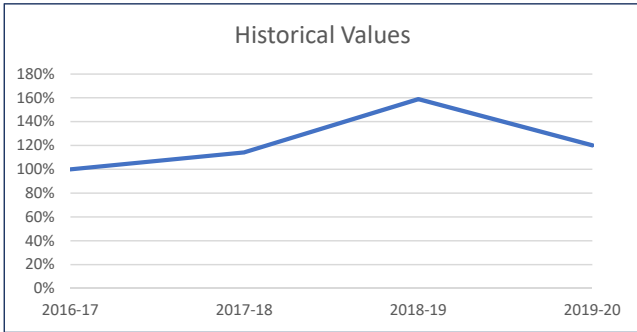
Graduate Employment Rate in a Related Field	Institutional Strength/Focus
Graduation Rate	Community/Local Impact of Student Enrolment
<b>Economic Impact (Institution-specific)</b>	Research Funding and Capacity: Federal Tri-Agency Funding Secured
Experiential Learning	Research Revenue Attracted from Private Sources
Graduate Employment Earnings	Skills & Competencies (Institution-specific)

**Definition**

The number of assessment-based student work-related placements in Durham/Northumberland Region.

**Data Source**

Institutional Experiential Learning Database



Note: Metrics 1-6 active during Year 1 (2020-21)  
 Metrics 1-9 active during Year 2 (2021-22)  
 Metrics 1-10 active during Year 3 (2022-23) and forward

Data not appearing indicates full allocation achieved

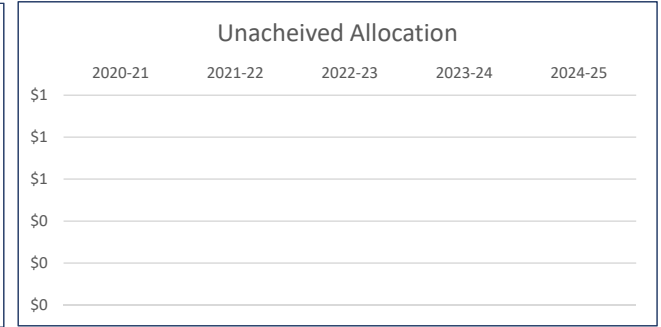
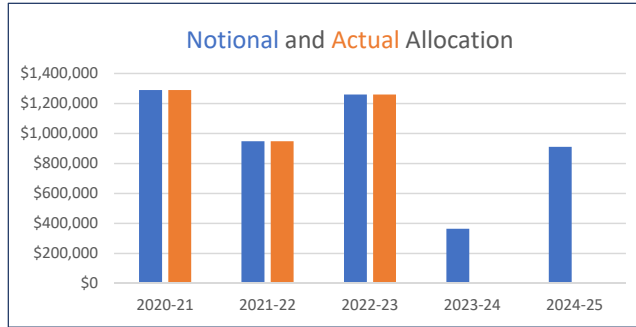
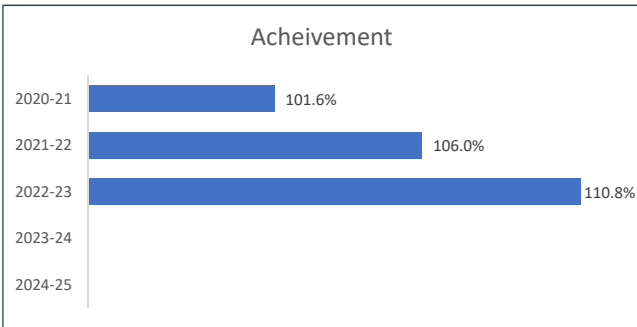
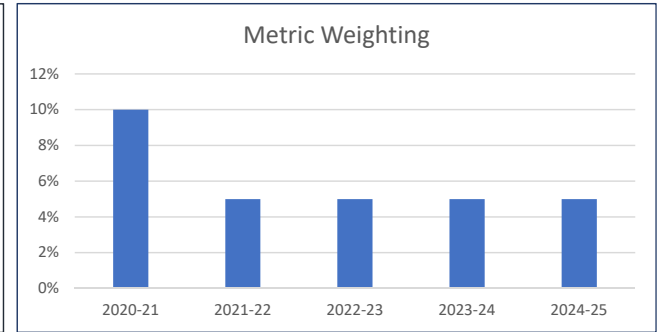
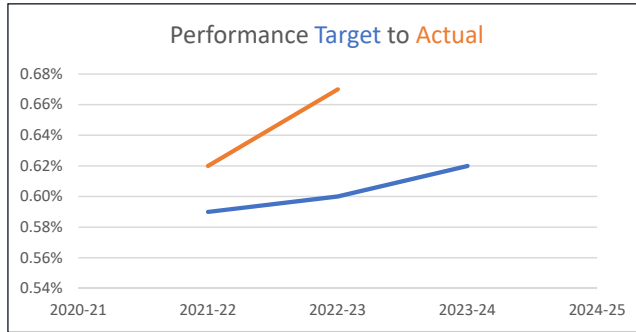
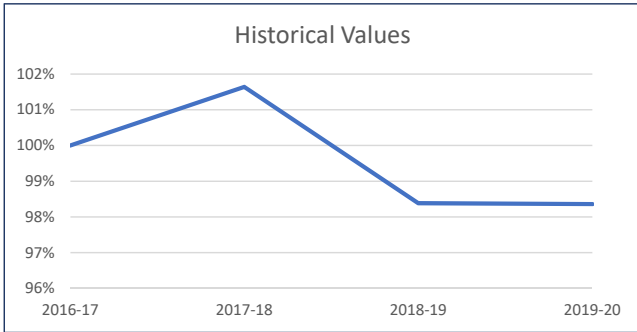
Graduate Employment Rate in a Related Field	Institutional Strength/Focus
Graduation Rate	Community/Local Impact of Student Enrolment
Economic Impact (Institution-specific)	<b>Research Funding and Capacity: Federal Tri-Agency Funding Secured</b>
Experiential Learning	Research Revenue Attracted from Private Sources
Graduate Employment Earnings	Skills & Competencies (Institution-specific)

**Definition**

Amount of funding received by university from federal research granting agencies and proportion of total Tri-Agency funding received by Ontario universities.

**Data Source**

Research Support Program, The Tri-Agency Institutional Programs Secretariat (TIPS)



Note: Metrics 1-6 active during Year 1 (2020-21)  
 Metrics 1-9 active during Year 2 (2021-22)  
 Metrics 1-10 active during Year 3 (2022-23) and forward

data not appearing indicates full allocation achieved

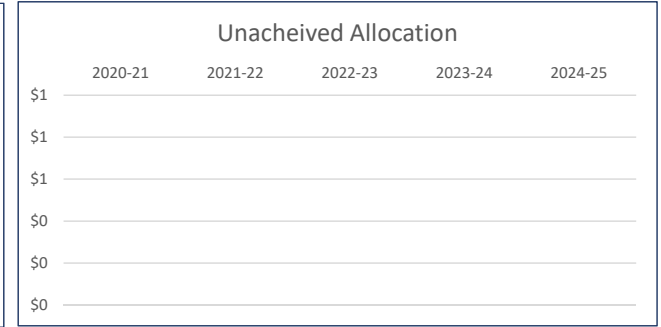
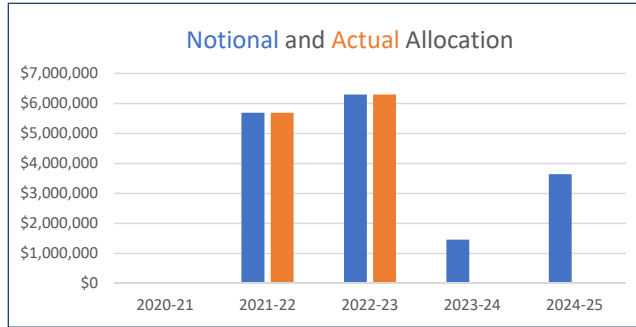
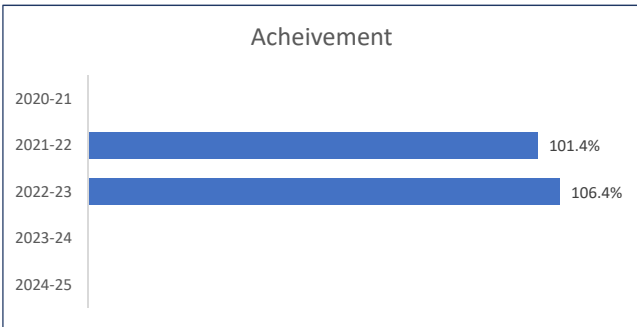
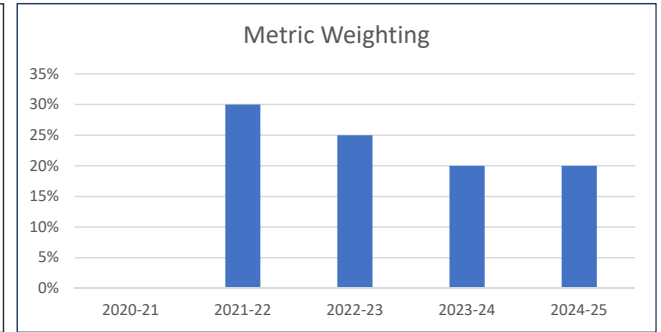
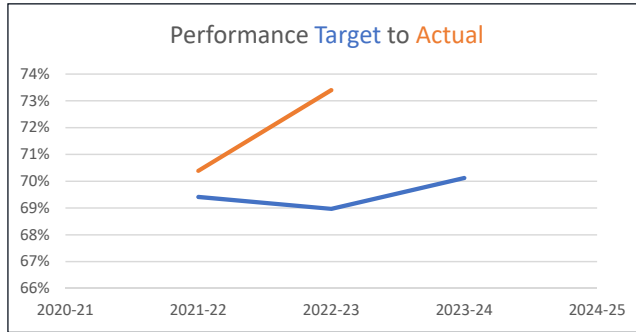
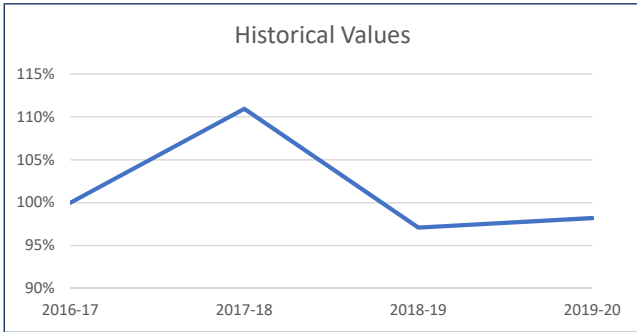
Graduate Employment Rate in a Related Field	Institutional Strength/Focus
Graduation Rate	Community/Local Impact of Student Enrolment
Economic Impact (Institution-specific)	Research Funding and Capacity: Federal Tri-Agency Funding Secured
<b>Experiential Learning</b>	Research Revenue Attracted from Private Sources
Graduate Employment Earnings	Skills & Competencies (Institution-specific)

**Definition**

Number and proportion of graduates in undergraduate programs, who participated in at least one course with required Experiential Learning (EL) component(s).

**Data Source**

Institutional data



Note: Metrics 1-6 active during Year 1 (2020-21)  
 Metrics 1-9 active during Year 2 (2021-22)  
 Metrics 1-10 active during Year 3 (2022-23) and forward

data not appearing indicates full allocation achieved



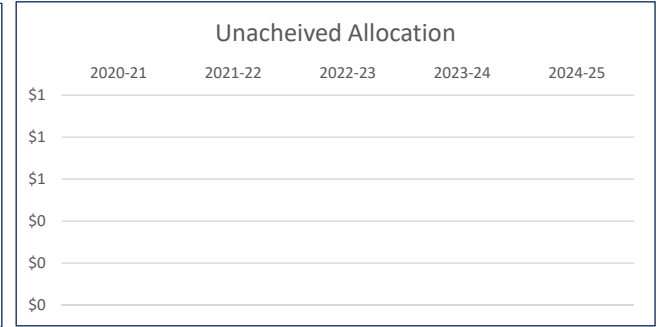
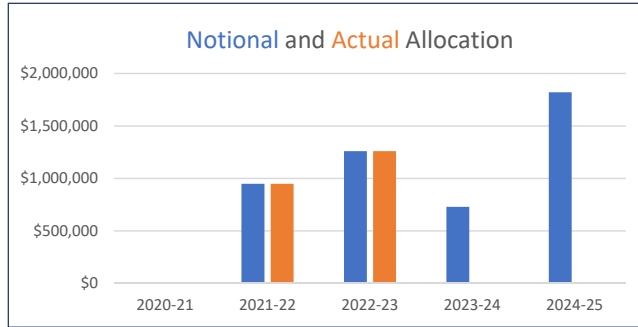
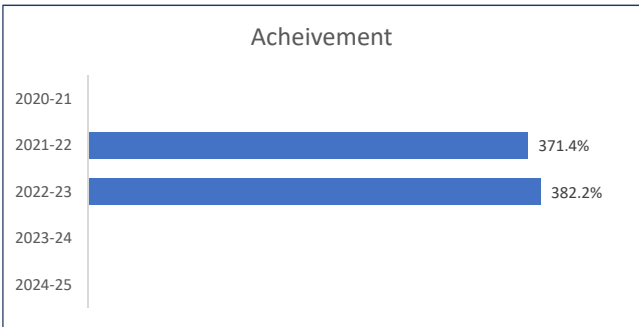
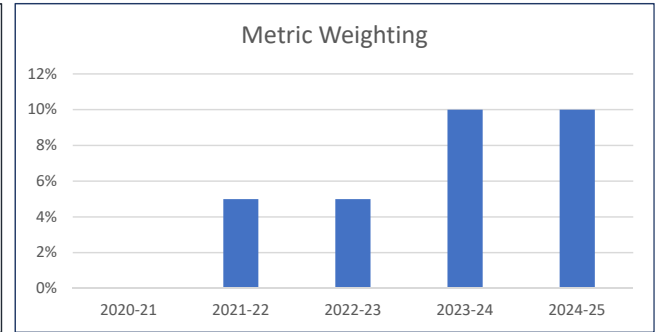
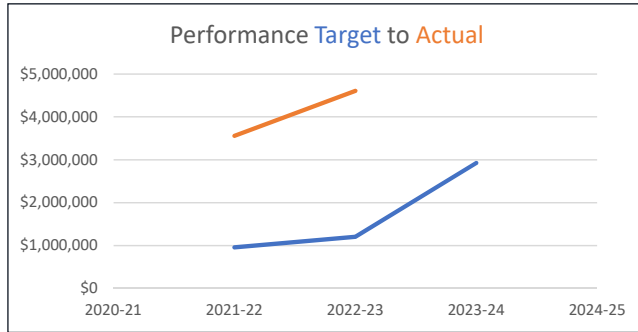
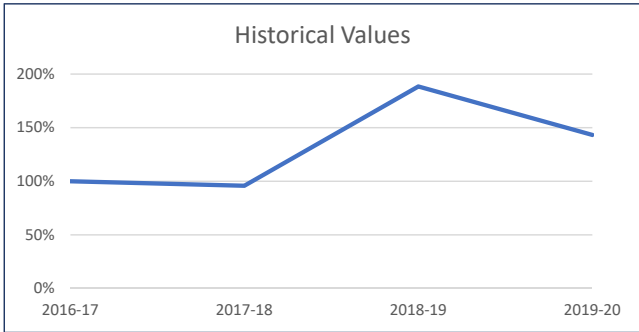
Graduate Employment Rate in a Related Field	Institutional Strength/Focus
Graduation Rate	Community/Local Impact of Student Enrolment
Economic Impact (Institution-specific)	Research Funding and Capacity: Federal Tri-Agency Funding Secured
Experiential Learning	<b>Research Revenue Attracted from Private Sources</b>
Graduate Employment Earnings	Skills & Competencies (Institution-specific)

**Definition**

Total research revenue attracted from private sector and not-for-profit sources

**Data Source**

Council of Ontario Finance Officers (COFO)



Note: Metrics 1-6 active during Year 1 (2020-21)  
 Metrics 1-9 active during Year 2 (2021-22)  
 Metrics 1-10 active during Year 3 (2022-23) and forward

Data not appearing indicates full allocation achieved

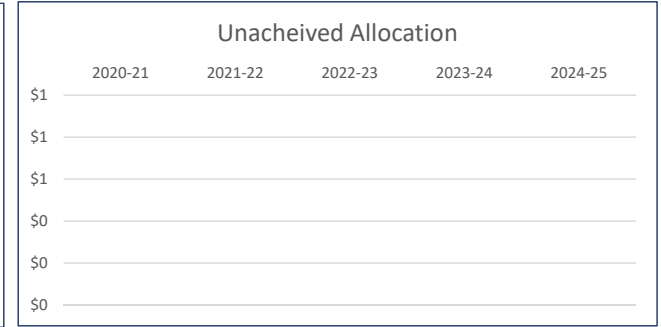
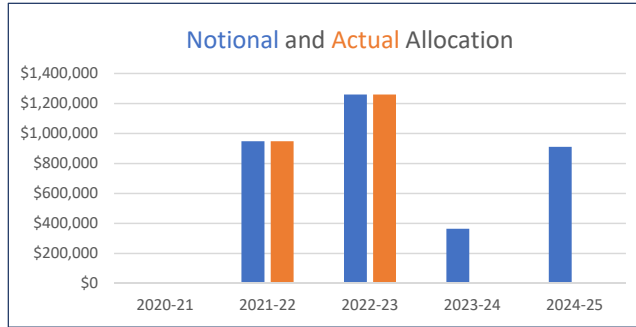
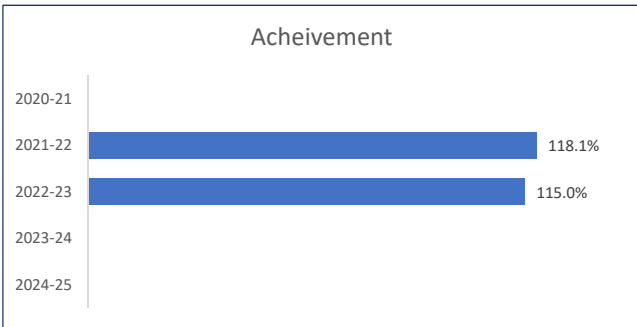
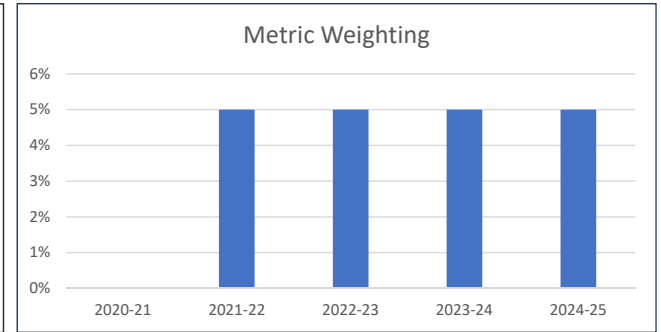
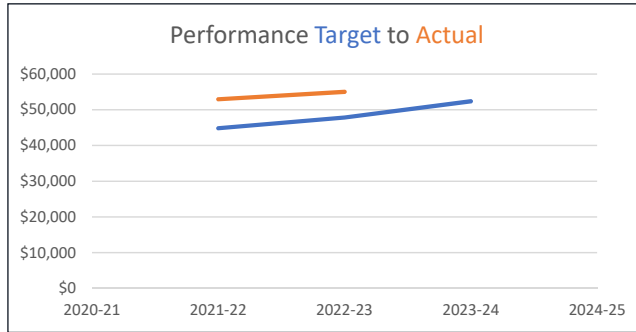
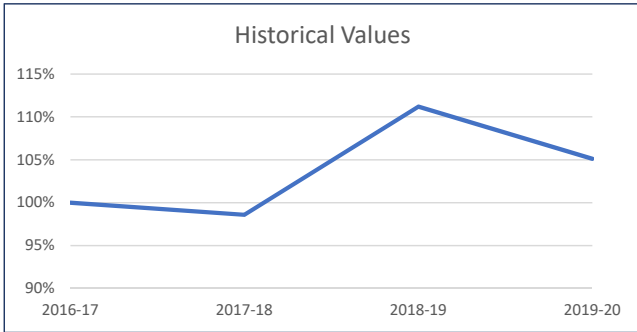
Graduate Employment Rate in a Related Field	Institutional Strength/Focus
Graduation Rate	Community/Local Impact of Student Enrolment
Economic Impact (Institution-specific)	Research Funding and Capacity: Federal Tri-Agency Funding Secured
Experiential Learning	Research Revenue Attracted from Private Sources
<b>Graduate Employment Earnings</b>	Skills & Competencies (Institution-specific)

**Definition**

Median employment earnings of university graduates, two years after graduation.

**Data Source**

Education and Labour Market Longitudinal Platform (ELMLP), Statistics Canada



Note: Metrics 1-6 active during Year 1 (2020-21)  
 Metrics 1-9 active during Year 2 (2021-22)  
 Metrics 1-10 active during Year 3 (2022-23) and forward

data not appearing indicates full allocation achieved

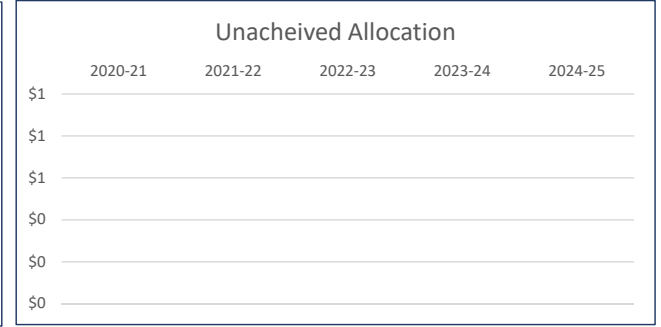
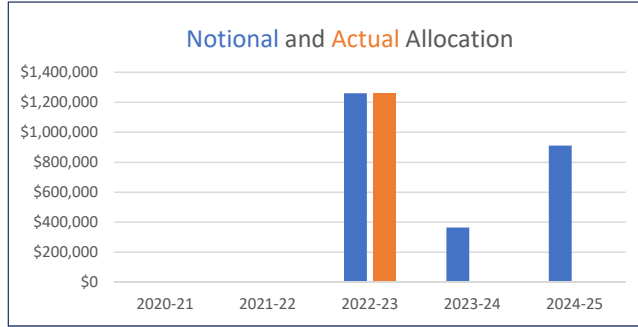
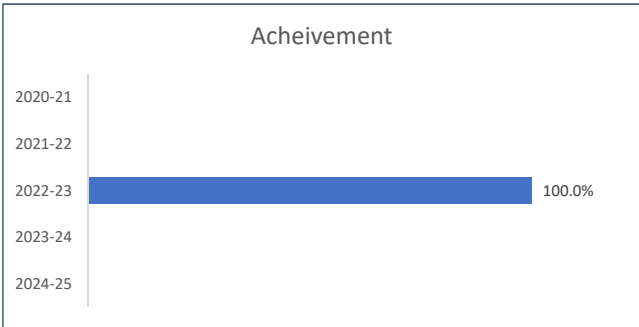
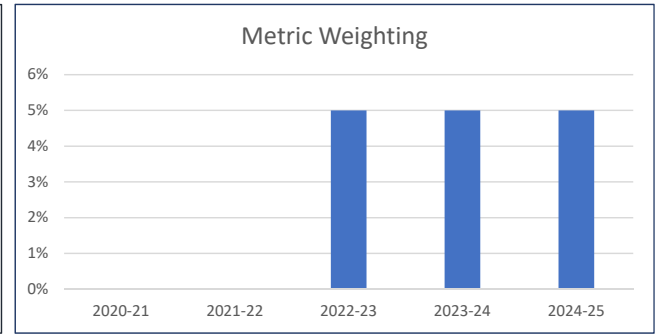
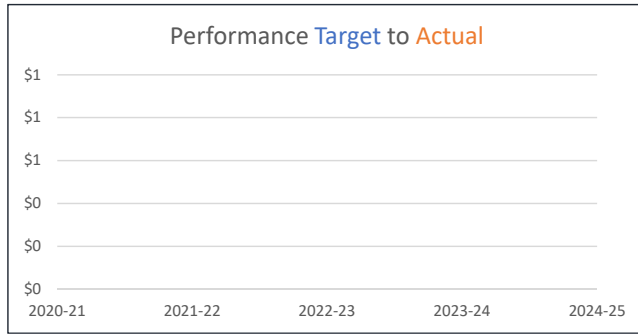
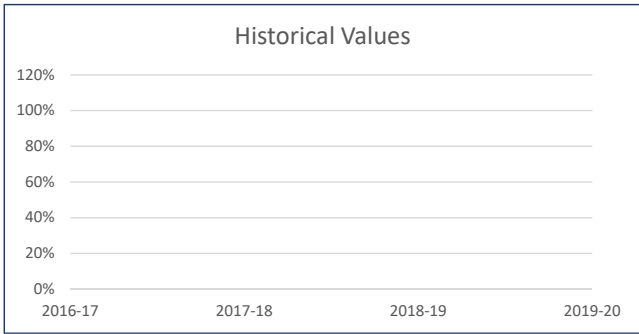
Graduate Employment Rate in a Related Field	Institutional Strength/Focus
Graduation Rate	Community/Local Impact of Student Enrolment
Economic Impact (Institution-specific)	Research Funding and Capacity: Federal Tri-Agency Funding Secured
Experiential Learning	Research Revenue Attracted from Private Sources
Graduate Employment Earnings	Skills & Competencies (Institution-specific)

**Definition**

Proportion of graduates of undergraduate (bachelor or first professional degree) programs who consider the skills they developed to be, "Quite a bit" or "Very much" attributed to their university program.

**Data Source**

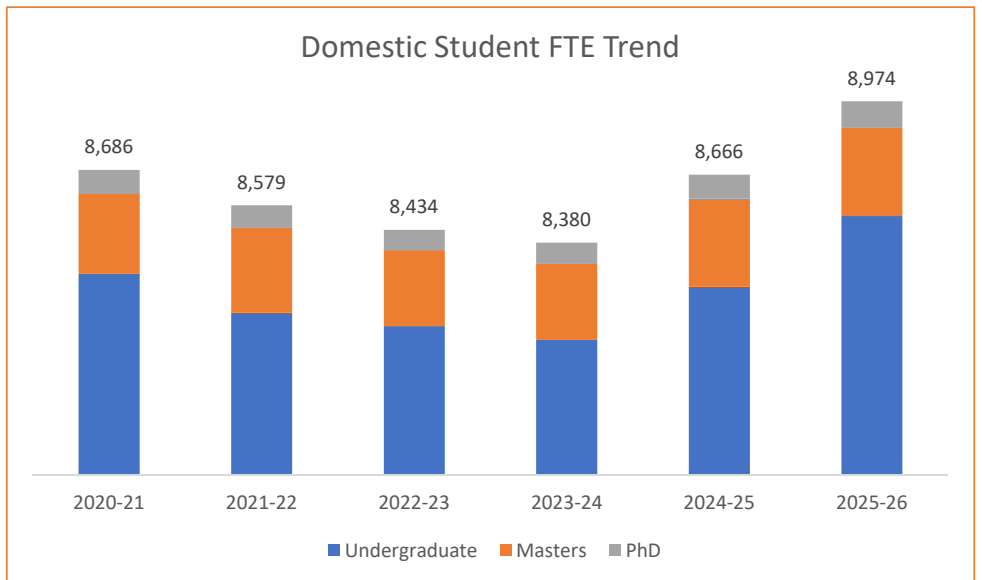
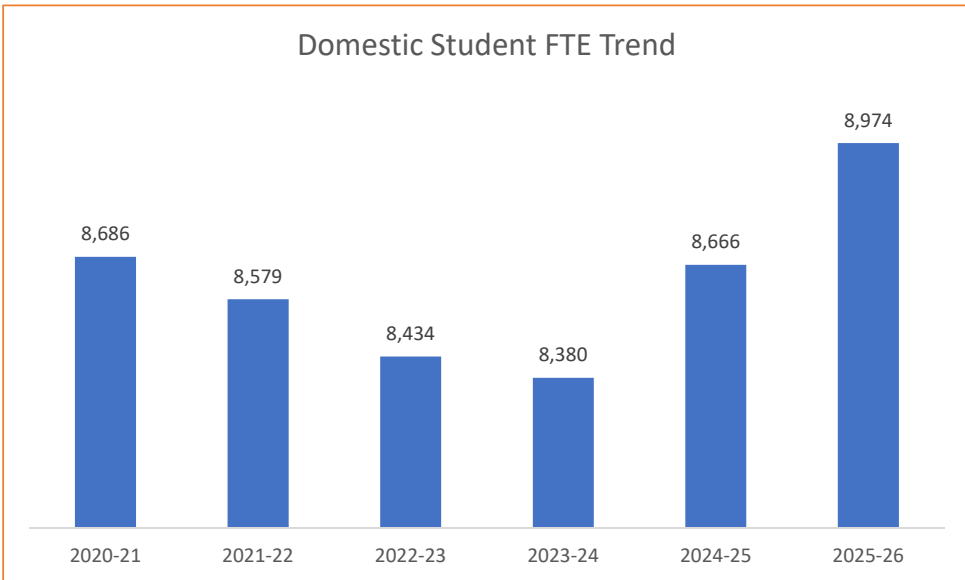
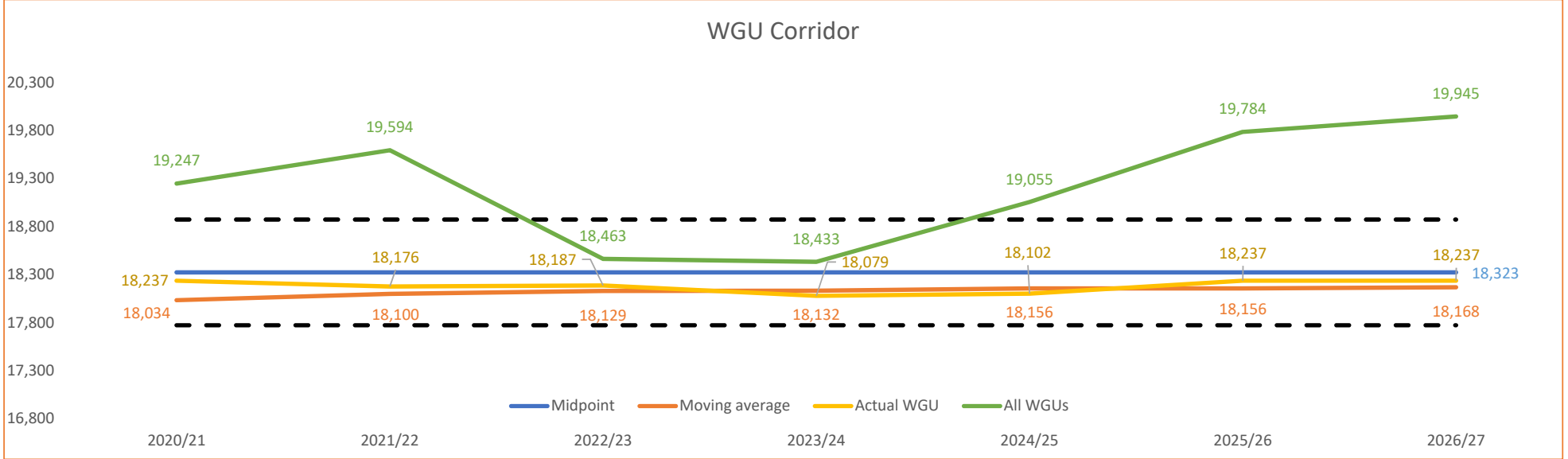
2023 NSSE Q18 (Senior Year Students) for SMA3 Yr4, Internal Graduation Survey Q1 for SMA3 Yr5



Note: Metrics 1-6 active during Year 1 (2020-21)  
 Metrics 1-9 active during Year 2 (2021-22)  
 Metrics 1-10 active during Year 3 (2022-23) and forward  
 (Metric 10: Skills & Competencies began in Fall 2022, as such there is no data prior to this year to report.)

data not appearing indicates full allocation achieved

# MCU Enroment Based - Corridor Funding



## COMMITTEE REPORT

---

**SESSION:**

Public   
Non-Public

**ACTION REQUESTED:**

Decision   
Discussion/Direction   
Information

**TO:** Board Strategy and Planning Committee

**DATE:** May 11, 2023

**PRESENTED BY:** Lori Livingston, Provost and Vice-President Academic

**SUBJECT:** 2022-23 Quality Assurance Process & Program Annual Report

---

**BACKGROUND/CONTEXT & RATIONALE:**

As part of the annual reporting process, the Centre for Institutional Quality Enhancement (CIQE) provides an annual report to Academic Council and the Board for information that provides a snapshot of quality assurance frameworks and enhancements, academic program development and a summary of the status of Ministry Program approvals of Ontario Tech programs.

The attached Quality Assurance Process and Program Annual Report (formerly named the CIQE Annual Report) outlines the quality assurance process and activities that have occurred over the past year that align our internal Quality Assurance processes with the Province's Quality Assurance principles and Framework.

**IMPLICATIONS:**

This is an annual report that is reported to Academic Council and the Board for information.

**ALIGNMENT WITH MISSION, VISION, VALUES & STRATEGIC PLAN:**

Supporting program innovations, new programs, and cyclical program review processes ensures program quality at the University is in keeping with the priorities in the Integrated Academic and Research Plan.

---

**SUPPORTING REFERENCE MATERIALS:**

2022-23 Quality Assurance Process & Program Annual Report



# Quality Assurance Process and Program Annual Report

April 2022 – March 2023

Centre for Institutional Quality Enhancement (CIQE)

## **Summary: Quality Assurance Process**

The Provost is responsible for overseeing the implementation and administration of the quality assurance process. The day to day management of the process resides with the Centre for Institutional Quality Enhancement (CIQE). The CIQE office along with the Deans and units implement the procedures that are outlined by the Quality Council's [Quality Assurance Framework](#).

As part of the annual reporting process, CIQE provides an annual report to Academic Council and the Board of Governors for information that provides a snapshot of quality frameworks and enhancements, academic program development and a summary of the status of Ministry Program approvals of Ontario Tech programs.

The following report outlines the academic program additions and changes related to the quality assurance process that occurred from April 2022 to March 2023.

## Contents

<b>1</b>	<b>Internal University Process</b>	<b>2</b>
1.1	Notice of Intent	2
1.2	Minor Curricular Changes	2
1.3	Minor Program Adjustments	3
<b>2</b>	<b>Quality Council Approval Process</b>	<b>4</b>
2.1	New Program Approvals	4
2.2	Expedited Reviews	4
2.3	Major Modifications (Program Renewal and Significant Change)	4
2.4	Cyclical Program Reviews	5
2.5	Cyclical Audit	7
<b>3</b>	<b>Follow-Up Process</b>	<b>8</b>
3.1	New Program Monitoring	8
3.2	18-month reports	8
<b>4</b>	<b>Ministry of Colleges and Universities Approvals</b>	<b>10</b>
	<b>Summary</b>	<b>10</b>

# 1 Internal University Process

## 1.1 Notice of Intent

For all new diploma and degree programs a Notice of Intent (NOI) must be submitted to the Provost for approval. Once approved by the Provost, the program has to go through the internal consultations and approvals, outlined in the columns below. Submission to Academic Council must be completed within two years of the NOI approval, however the process takes about 13-15 months to get through the internal approval process.

This year there were three (3) programs that underwent the NOI process. Their progress is indicated in Table 1.1 below.

**Table 1.1 Notice of Intent Internal Progress**

Program	Notice of Intent	Academic Resource Committee	CPRC/USC/GSC	Academic Council	Board of Governors
BASc Sustainability*	Aug-20	Jan-23			
MASc/MEng Mechatronics*	Nov-20	Nov-22			
PhD Cybersecurity	Feb-23				

\*the Provost approved NOI extensions for these programs

## 1.2 Minor Curricular Changes

Minor curricular changes are changes at the course level only and do not impact overall program requirements. These include changes in elective offerings, course titles, descriptions, course delivery, or credit weighting of elective courses. For the reporting timeframe there were a total 531 minor curricular changes, these are provided by Faculty in Table 1.2.

**Table 1.2 Minor Curricular Changes by Faculty**

Faculty	Minor Curricular Changes
Faculty of Business and Information Technology	27
Faculty of Education	99
Faculty of Engineering and Applied Science	21
Faculty of Health Sciences	57
Faculty of Science	27
Faculty of Social Science and Humanities	300

The majority of minor curricular changes occurred for mode of delivery with the addition of online or hybrid options. Expanding mode of delivery options for courses will allow for greater flexibility in course offerings should the need arise.



### 1.3 Minor Program Adjustments

Minor program adjustments impact overall program requirements but do not greatly impact the program learning outcomes. These include the introduction of new required courses, deletion of required courses, editorial changes to degree requirements or program learning outcomes, or changes or additions to new academic requirements. For the reporting timeframe there were a total 31 minor program adjustments, shown in Table 1.3.

**Table 1.3 Minor Program Adjustments by Faculty**

Faculty	Minor Program Adjustments
Faculty of Business and Information Technology	7
Faculty of Education	3
Faculty of Engineering and Applied Science	7
Faculty of Health Sciences	6
Faculty of Science	2
Faculty of Social Sciences and Humanities	6

## 2 Quality Council Approval Process

### 2.1 New Program Approvals

This applies to both new undergraduate and graduate programs and is used to secure the academic standards of new programs and to assure their ongoing improvement. The Quality Council reviews the programs, and has the final authority to approve or decline new programs.

There were no new programs submitted to the Quality Council for approval during the annual reporting timeframe.

Brief descriptions of all previously [approved programs](#) from the Quality Council can be found on the Quality Council's website.

### 2.2 Expedited Reviews

This applies to for-credit graduate diplomas. The Quality Council can also request this type of review for a new field in a graduate program, or request based on proposed major modifications of an existing program.

There were no programs submitted to the Quality Council for expedited review approval during the annual reporting timeframe.

### 2.3 Major Modifications (Program Renewal and Significant Change)

Major program modifications result in substantive changes to the nomenclature, program requirements, and/or program learning outcomes. These include significant changes to the learning outcome, faculty engaged in the delivery of the program, or the addition of a new field to an existing graduate program. A report of all major modifications is provided to the Quality Council annually in July.

**Table 2.1 Major Modifications Governance Progress**

Faculty	Program	Faculty Council	USC/GSC	Academic Council
Faculty of Education	MA, MEd, UG and GR Diploma, Education	Nov-23	Jan-23	Feb-23
	BA, Educational Studies	Apr-23	May-23	Jun-22
	BA, Educational Studies	Dec-22	Jan-23	Feb-23
	UG Diploma, Facilitating Adult Learning with Technology	Dec-22	Jan-23	Feb-23
Faculty of Engineering and Applied Science	MEng, Automotive Engineering	Oct-23/Dec-23	Jan-23	Mar-23
	MEng, Electrical and Computer Engineering	Oct-23/Dec-23	Jan-23	Mar-23
	MEng, Mechanical Engineering	Oct-23/Dec-23	Jan-23	Mar-23
Faculty of Health Sciences	MScN, Nursing	Dec-22	Jan-23	Feb-23

Faculty	Program	Faculty Council	USC/GSC	Academic Council
Faculty of Science	BSc, Biological Science, Environmental Toxicology	Dec-23	Dec-22	Jan-23
	BSc, Mathematics for Science and Industry	Dec-23	Jan-23	Feb-23
Faculty of Social Sciences and Humanities	BA, All programs	Dec-22	Jan-23	Feb-23
	BA, Communication and Digital Media Studies	Dec-22	Jan-23	Feb-23
	BA, Criminology and Justice	Dec-22	Jan-23	Feb-23
	MA, Criminology	Nov-22	Jan-23	Feb-23
	BA, Forensic Psychology	Dec-22	Jan-23	Feb-23
	BA, Legal Studies	Jan-23	Jan-23	Feb-23
	BA, Liberal Studies	Dec-22	Jan-23	Feb-23
	BA, Political Science	Dec-22	Jan-23	Feb-23
	BA, Psychology	Dec-22	Jan-23	Feb-23
BA, Social Innovation and Entrepreneurship Minor	Dec-22	Jan-23	Feb-23	

## 2.4 Cyclical Program Reviews

As set by the Quality Council all existing undergraduate degree programs, graduate degree programs, and for-credit diploma programs are subject to review once every eight years.

The cyclical program review allows for an in-depth, critical look at the program and follows an [internal 2-year timeframe](#). The review involves the following six components:

- Review and enhancement of program learning outcomes;
- Development of a self-study brief;
- External evaluation to provide recommendations on program quality improvement;
- Internal responses to the external review and recommendations;
- Preparation and approval of a [Final Assessment Report \(FAR\)](#) and implementation plan; and
- Subsequent reporting on the implementation of recommendations (18-Month reports discussed under Follow-Up Process, Section 3.2 below)

The number of programs and the review cycle process they are currently in is provided in Table 2.2 below, presented by Faculty and degree level. The [program review schedule](#) is posted on the CIQE website for reference at any time.

**Table 2.2 Cyclical Program Review Process Stage Summary**

Level/Faculty	Self-Study	External Review	Total
<b>Undergraduate</b>	<b>7</b>	<b>1</b>	<b>8</b>
Faculty of Business and Information Technology	2		2
Faculty of Education			
Faculty of Engineering and Applied Science			
Faculty of Health Sciences	3		3
Faculty of Science	1		1
Faculty of Social Science and Humanities	1	1	2
<b>Graduate</b>	<b>9</b>	<b>1</b>	<b>10</b>
Faculty of Business and Information Technology	1		1
Faculty of Education			
Faculty of Engineering and Applied Science	3		3
Faculty of Health Sciences		1	1
Faculty of Science	3		3
Faculty of Social Science and Humanities	2		2

Programs that have finalized their internal portions of the process and have now submitted their FAR to University governance are listed in Table 2.3 below. Once all of the university governing bodies have been provided the report for information it is then submitted to Quality Council.

**Table 2.3 Cyclical Program Review Governance Progress**

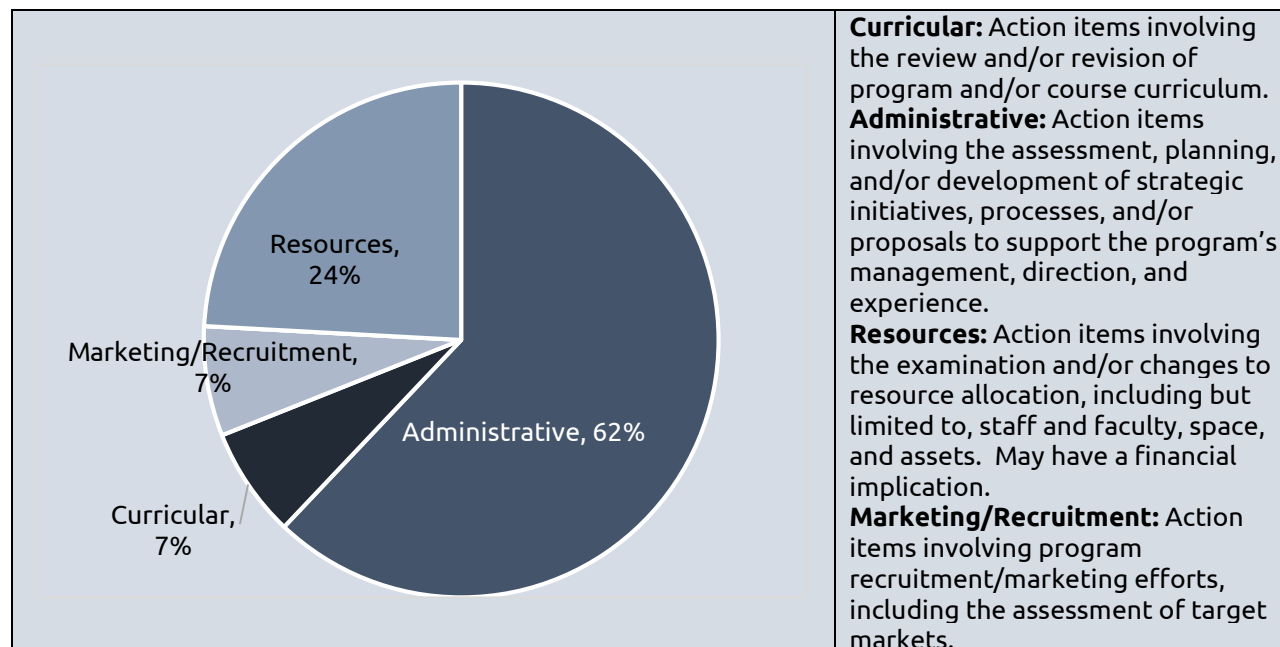
Program	Faculty Council	Academic Resource Committee	CPRC/USC/GSC	Academic Council	Board of Governors
BSc Computer Science	Sep-22	Sep-22	Oct-22	Nov-22	Dec-22
MSc & PhD Computer Science	Nov-22	Dec-22	Jan-23	Feb-23	Mar-23
BSc Physics	Apr-23	Apr-23			

There continues to be an overall increase in the number of reviewer recommendations, and subsequent action items coming out of the cyclical program reviews. A breakdown of the FAR thematic trends is outlined in the pie chart, Chart 2.1 below.

A total of 29 action items were reported at both the program and course level. A sample of action items are:

- Increase co-op participation;
- Analysis of retention rates;
- Expand upper-level course offerings;
- Provide additional supports for labs (equipment, training);
- Enhance connections with current students and alumni
- Increase online Library collections and engage Librarian in upper-year courses.

**Chart 2.1 Final Assessment Report Thematic Trends**



## 2.5 Cyclical Audit

The Quality Council approves each university’s [Institutional Quality Assurance Process \(IQAP\)](#) and conducts a periodic audit of how each university’s IQAP is administered to ensure that the manner in which each university conducts its program reviews conforms both to the university’s IQAP and the Quality Assurance Framework.

Ontario Tech had its last audit in the [winter of 2019-20](#), and we are scheduled to have our next audit in the winter of 2029-30.

## 3 Follow-Up Process

### 3.1 New Program Monitoring

In the first year of intake and one year after the launch of a program, an initial report is prepared for the Academic Resource Committee (ARC) that will review enrolment data, admission averages, and other key metrics to assess the new programs effectiveness.

The programs that underwent an intake report were:

- Bachelor of Health Administration
- Doctor of Education
- Master of Business Analytics and AI
- Bachelor of Science – Biological Science, Marine Biology Specialization

The programs that provided a one-year report were:

- Integrated Math and Computer Science
  - ARC has requested further monitoring of both intake and retention rates to be completed in one year.

### 3.2 18-month reports

Eighteen-month follow-up reports comment on the completion of action items outlined in the initial final assessment reports. ARC reviews these reports to gain insight into how many actions have been completed, and if not, for what reasons. Reviewing the completion level assists the committee in resource planning for how to support current programs under review not yet at the 18-month mark. It also allows for discussions with the program about the feasibility of action items outlined at the FAR stage of the review to ensure success 18-months later.

For 2022-2023, there were three 18-month follow-up reports as part of the cyclical program review process follow up.

- Bachelor of Science, Forensic Science
- Bachelor of Arts, Forensic Psychology
- Bachelor of Science, Applied and Industrial Mathematics

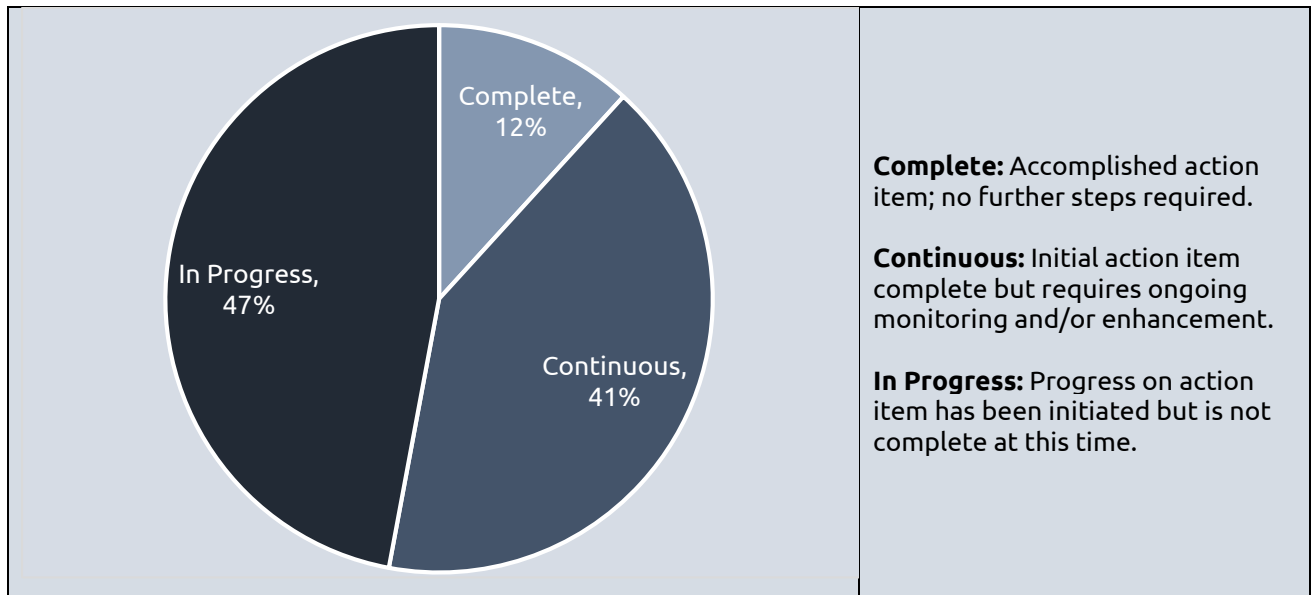
A copy of all [18-month reports](#) are available on the CIQE website for reference.

Upon reviewing the follow-up reports, the majority of action items are in progress or require continuous monitoring following the 18-month time frame. A selection of these items is outlined below.

- Continue to offer a selection of in-person and online courses post-pandemic while navigating online assessment challenges.
- Ongoing and formal communication with the recruitment and marketing teams to enhance enrolment.
- Improve exposure of early-year students to research faculty.
- Expand collaborative projects and connections with other Faculties.

The following chart outlines the overall process status of the 17 action items found in these reports.

**Chart 3.1 Final Assessment Reports Action Items Status, 18-month follow-up**



It falls to the Faculty to indicate when an action item has been completed and these are reported at the Academic Resource Committee (ARC) . After the 18-month review the Faculty Dean and the Provost discuss any outstanding or in progress items to be updated within the CIQE files.

## 4 Ministry of Colleges and Universities Approvals

While a program can be offered once the Quality Council has provided approval, receiving Ministry of Colleges and Universities (Ministry) approval allows for the students taking these programs to be eligible for OSAP funding and allows the institution to report domestic students towards our enrolment grant corridor.

The programs that were submitted for Ministry approval are provided in Table 4.1 below. Only one program, Undergraduate Diploma in Public Policy, was denied by the Ministry. The rationale was that the Ministry had, “concerns with respect to alignment with Ontario Tech’s focus to provide undergraduate and graduate programs that are technology enriched”. The Faculty is currently looking at options as to how to move forward with the program that was developed.

**Table 4.1 Ministry of Colleges and Universities Submission and Approval Dates**

Program	Submission Date	Approval Date
Doctor of Education (EdD)	Nov-21	May-22
Master of Financial Data Analytics	Dec-21	May-22
MASc/MEng Software Engineering	Feb-22	May-22
BEng Industrial Engineering	Mar-22	Sep-22
BEng Energy Engineering	Mar-22	Sep-22
Undergraduate Diploma Public Policy	Mar-22	Denied
Graduate Diploma in Police Leadership	Nov-21	Dec-22

### Summary

As we worked through the pandemic there were instances where extensions were given in order to accommodate a more flexible and ever changing post-secondary landscape. As we begin to embark on the post pandemic era, timelines and process steps will fall under traditional timelines. The CIQE office will continue to monitor these timelines and communicate with the Provost and all Faculties to ensure that they are met.

The majority of quality assurance processes, aside from new programs, all saw increases over the past year. With many NOIs pending we are anticipating that the new program process will pick up in the upcoming year. It is also expected that, going into its third decade, the university will see the volume of activity related to quality assurance processes such as curricular additions and changes remain high in order to maintain quality and remain relevant to students. The volume of programs undergoing the cyclical review process has been substantial this cycle and will continue in this pattern due to timing of program initiation and as a result of expanding the review process from 1-year to 2-years.



## COMMITTEE REPORT

---

**SESSION:**

Public   
Non-Public

**ACTION REQUESTED:**

Decision   
Discussion/Direction   
Information

**TO:** Board Strategy and Planning Committee

**DATE:** May 11, 2023

**PRESENTED BY:** Lori Livingston, Provost and Vice-President, Academic

**SUBJECT:** 2022-2023 Continuous Learning Annual Report

---

**BACKGROUND/CONTEXT & RATIONALE:**

As part of the annual reporting process, Continuous Learning provides an annual report to Academic Council and the Board that provides a summary of the program offerings, enrolments in programs as well as major activities to expand professional development program offerings.

**IMPLICATIONS:**

This is an annual report that is reported to Academic Council and the Board for information.

**ALIGNMENT WITH MISSION, VISION, VALUES & STRATEGIC PLAN:**

As Continuous Learning expands its program offerings and partnerships, it is able to provide the community with more flexible and accessible training options while also generating alternative sources of revenue for the University. The programming and outreach align with all four strategic priorities in the Integrated Academic and Research Plan.

---

**SUPPORTING REFERENCE MATERIALS:**

2023 Continuous Learning Annual Report

# Continuous Learning Annual Report 2022-2023

STRATEGY AND PLANNING

PREPARED BY: CONTINUOUS LEARNING

## **Background**

Established in 2019, Ontario Tech University's Continuous Learning unit is a hub for not-for-credit and non-degree programming at the university. Continuous Learning promotes and facilitates non-degree learning initiatives, both independently and in collaboration with Faculties. Working with Faculties across campus, Continuous Learning builds and houses certificate programs, micro-credentials and other learning opportunities that support lifelong learning.

In 2022-2023, Continuous Learning actively engaged in developing transparent financial models that align with the University Intellectual Property policy and collective agreements. These models aim to ensure that faculty members receive fair compensation for their valuable contributions to these learning initiatives. By encouraging faculty member participation, while simultaneously ensuring financial sustainability, Continuous Learning seeks to create an environment that benefits all stakeholders involved and encourages additional participation in the development of relevant professional development. This initiative seeks to align Continuous Learning with the university's strategic priorities of re-imagining learning and developing academic partnerships.

## **2022-23 Activity**

In August 2022, a new Director was hired and took over from the Interim Director. The Director gained an understanding of the role and responsibilities and focused on the partnerships and legacy relationships that exist between Continuous Learning and Faculties and other administrative units across the University.

Developing an understanding of these partnerships and the key players was a critical first step in meeting our mandate to promote additional partnerships with the Faculties and faculty members in the future. Initial development of financial models in 2022-2023 to promote additional partnerships has allowed for several initiatives that are being pursued for development and launch in 2023-2024.

Continuous Learning also streamlined internal processes to support the development of new programs and courses. We improved website development and transitioned to a new template, enhanced registration management procedures, and standardized the use of our registration and learning management system.

## **Open Enrolment**

From April 2022 to March 2023, Continuous Learning recorded 296 open enrolment program registrations with 196 program completions, representing modest growth over the previous year.

We launched two new programs:

1. Introduction to Higher Education Management University Certificate program. This was developed in partnership with the Faculty Business and Information Technology and subject matter experts from Durham College and Trent University.
2. Full Stack Developer. This is offered in partnership with Robogarden, an Alberta based organization specialized in “full-stack” programming.

### **Corporate Training**

Significant growth was achieved in Corporate Training initiatives with 15 specific programs delivered for 10 separate organizations, compared to 9 programs in 2021-2022. We issued 256 individual program certificates in leadership development and other custom training programs. Our expertise in leadership development was expanded to include specific industry focus areas in Early Childhood Education, Policing, and Healthcare Change Management. This adds to our considerable expertise in Nuclear Operations (through our partnership with the Faculty of Engineering and Applied Science and the Director of Industry Training) and notable developments in our capacity to deliver training in specific focus areas including CANDU decommissioning, Small Modular Reactors, Hybrid Energy Systems, and more.

In 2022-2023, preparations were made to hire a contract Business Development and Marketing Manager in May 2023. This Manager will have a focused mandate to expand our client base for corporate training.

### **Microcredentials**

As Continuous Learning enters the 2023-2024 academic year, the department continues to support Ontario Tech’s Microcredentials and Badge programs. Over the past year 833 unique users received 738 TD Microcredential badges and the available courses has increased to over 30 topics of interest. It should be noted that a number of additional students have registered for a microcredential, but have yet to complete the requirements to receive their badge.

Continuous Learning continued to support the development of eCampus Ontario Virtual Learning Strategy funded microcredentials. These include French translations of Dementia modules and Interprofessional Communication for Medical Laboratory Technicians.

### **Summer Camps**

The Summer Camps program, offered in partnership with the Faculty of Education and Faculty of Engineering and Applied Science, provides fun, hands-on opportunities for children ages six to seventeen to learn and explore their curiosity in a positive, safe environment. The program runs annually for eight consecutive weeks—from July to August. In 2022 the summer camps program returned to an in-person format, with virtual camp options available to include long-distance families and those not yet ready to return to an in-person format. Bringing the camps program back to an in-person format post-pandemic included several operational unknowns, which ultimately delayed the launch of camps registration by two months. In particular, the possibility of camper and staff cohorting shortfalls questioned the viability of the entire summer program.

As Ontario continued to lift COVID-19 guidelines, final policy implementations included absence due to illness reporting, masking while in university spaces and a flexible refunds policy for ill campers. Despite registration opening in April 2022, the program attracted 1,281 camp registrations. In-person camps were offered weekdays from 9 a.m. to 4 p.m. with extended care available. Virtual camps, in contrast, were available for two hours per weekday.

**2022 Summer Camp Offerings by Camp Type**

Unique camp offerings	In-person (week-long)	Virtual (week-long)	Family (one-day camp)
48 <sup>1</sup>	45	7	5

Continuous Learning surveyed its 2022 summer camp cohort to gain camper testimonials and valuable feedback, and to identify improvements for the 2023 summer program. The upcoming 2023 Summer Camps program again offers a mix of in-person and virtual camps with most camps being held in-person at Ontario Tech’s north campus location. Registration for 2023 Summer Camps opened in February, and Continuous Learning has partnered with Athletics and Recreation and Engineering Outreach to pilot a half-sports, half-engineering camp to kids age 12-13.

**Spring Camps**

In 2023, Continuous Learning offered its second virtual spring camps program from March 14 to March 18. The expanded program included five camps which filled to 54% capacity with 107 camp registrations. Each camp ran for two hours per weekday and was geared toward children aged 6 to 13. The previous year’s camps had significantly higher numbers than this year’s due to the pandemic. There were not very many in-person camp options available in March 2022.

For 2024, Continuous Learning is actively exploring how a small number of camps could be delivered in person, whether on campus, or in partnership with another organization at their location. School age March break does not coincide with university breaks, which significantly limits on-campus options.

A listing of all Continuous Learning opportunities and number of registrants during the year is provided in Appendix A.

---



<sup>1</sup> Certain camps run more than once resulting in the number of unique camp offerings (48) being lower than the total number of camps run (57)

## APPENDIX A: Continuous Learning

Summary of Continuous Learning activities from April 2022 to March 2023. Only activities that grant an official certificate or letter of completion have been included below. ★ = new this year

Faculty or Non-academic Unit	Brief Description of Offering	Number of Hours or Length of Offering	Number of registrants **	Number of certificates awarded
Continuous Learning	<b>University Preparatory Program:</b> A specialized certificate program designed to prepare high school graduates for the academic demands of university consisting three (3) pillars: numeracy, literacy and academic success, and a supportive coaching component.	3 months (1 Semester)	55 offers sent, 36 registrants	20
Continuous Learning	<b>Professional Management:</b> A certificate program consisting of five (5) courses designed to enhance the managerial effectiveness and leadership abilities of today's business professionals.	30 hours	19	8
Continuous Learning	<b>Not-for-Profit Leadership:</b> A certificate program consisting of five (5) courses designed to meet the unique challenges faced by managers in the Not-for-Profit sector.	30 hours	12	7
Continuous Learning	<b>Professional Communications Program:</b> Consists of five (5) courses designed to enhance the effectiveness of communication abilities of today's business professionals. These courses provide a solid	30 Hours	10	5

Faculty or Non-academic Unit	Brief Description of Offering	Number of Hours or Length of Offering	Number of registrants **	Number of certificates awarded
	foundation of business skills and practices for supervisors, managers, and technical professionals who require functional management and leadership training			
Continuous Learning	<b>Digital Management:</b> A re-designed social media program. This three (3) course program is designed for those who need take action and launch a Social Media strategy they can implement right away so that they can obtain a successful return on investment for their organization.	18 hours	7	5
Continuous Learning	<b>Master's Certificate in Public Sector Management:</b> A certificate program consisting of fifteen (15) courses that requires application and approved admission designed for managers and executives with diverse educational backgrounds who are experienced in a public sector/government or related organization.	90 hours	31	31
Continuous Learning	<b>LEAN Green Belt:</b> A certificate program offered in partnership with Leading Edge Group focused on the lean management approach.	N/A	N/A (courses taken with Leading Edge group)	27


Faculty or Non-academic Unit	Brief Description of Offering	Number of Hours or Length of Offering	Number of registrants **	Number of certificates awarded
Continuous Learning	 <b>Introduction to Higher Education Management:</b> Asynchronous course designed for anyone employed (or looking to be employed) with a post-secondary educational facility looking to enhance their administrative skills.	6 Hours (Asynchronous)	40 (including free registrations as part of a pilot)	6 (as the program was only recently launched, many have not yet completed)
<b>Custom Courses/Programs</b>				
Continuous Learning / Faculty of Engineering and Applied Sciences	<b>CANDU Station System Design and Operation – Custom courses for Canadian Nuclear Safety Commission (CNSC):</b> Nuclear Power Plant Operations Training for Regulators.	8 x 1-week courses; Each 1-week course contains 35 learning hours; 280 hours total for all 8 courses; Maximum of two (2) cohorts per year. Participants take up to 8 modules.	19 in 2021/22 cohort  <i>Note: 2023 cohort is to be scheduled</i>	39 module certificates issued January through March 2022  65 module certificates issued April through September 2022
Continuous Learning / Faculty of Engineering and Applied Sciences	 <b>Custom course for Canadian Nuclear Safety Commission (CNSC):</b> Small Modular Reactor (SMR) Design.	Standalone 1-week course consisting of 35 learning hours; Inaugural delivery (February 2022); second and	26 February 2022  22 October 2022; 24 January 2023	24 February 2022  21 issued October 2022; 23 issued January 2023



Faculty or Non-academic Unit	Brief Description of Offering	Number of Hours or Length of Offering	Number of registrants **	Number of certificates awarded
		third offering October 2022 and January 2023.	2023/24 cohort TBD	
Continuous Learning	<b>Ontario Shores Custom Leadership Program (2022) – (Peterborough Regional Health and Northumberland Hills Hospital/Ontario Shores):</b> A custom certificate program consisting of five (5) courses designed to develop strategies and insight related to change management specific to healthcare-based organizations.	30 hours	20	20
Continuous Learning	<b>Certificate in Leadership Excellence – Custom program for Durham Region:</b> A custom certificate program consisting of eight (8) leadership excellence courses aligned with Durham Region’s core values. Graduates move on to take the Master’s Certificate in Public Sector Management program.	60 hours; one (1) to two (2) cohorts per year	20	14
Continuous Learning	<b>Certificate in Police Leadership – Custom program for Durham Regional Police Services (DRPS):</b> A certificate program designed to develop leadership strategies aligned with DRPS core competencies. The program consists of three (3) modules, each with four (4) weeks of online content and one (1) half-day, in-class workshop.	Three (3) months; 1 cohort	25	15

Faculty or Non-academic Unit	Brief Description of Offering	Number of Hours or Length of Offering	Number of registrants **	Number of certificates awarded
Continuous Learning / Faculty of Engineering and Applied Science	<p><b>Advanced Operations Overview for Managers (AOOM) – Custom Program for Ontario Power Generation (OPG):</b> Development and delivery of training to operational managers in the nuclear industry.</p>	<p>20 weeks total; 6 hours lecture time per day; 18 days for self-study, and 3 field tours. Approximately 445 lecture hours total. Additional guided and self-guided field tours and self-study days not counted towards total lecture hours.</p>	<p>5 in 2021 9 in 2022 6 in 2023</p>	<p>5 in 2021 9 in 2022 <i>Note: 2023 program concludes June 2023.</i></p>
Continuous Learning	<p><b>Organizational Development &amp; Performance Improvement (PEL 77863)– Custom program for OPG:</b> Under a five (5) year agreement (2018-2023), course offerings may run multiple times each quarter (based on OPG scheduling).</p>	<p>One (1) course offering (6 Hours)</p>	<p>N/A</p>	<p>N/A</p>
Continuous Learning	<p><b>Stakeholder and Change Management (PEL 77870) – Custom program for OPG:</b> Under a five (5) year agreement (2018-2023), course offerings may run multiple times each quarter (based on OPG scheduling).</p>	<p>Five (5) course offerings (30 Hours)</p>	<p>N/A</p>	<p>N/A</p>

Faculty or Non-academic Unit	Brief Description of Offering	Number of Hours or Length of Offering	Number of registrants **	Number of certificates awarded
Continuous Learning	<b>Oversight Execution: Conflict Resolution, Negotiation and Communication Skills (PEL 70705) – Custom program for OPG:</b> Under a five (5) year agreement (2018-2023), course offerings may run multiple times each quarter (based on OPG scheduling).	One (1) course offering (6 Hours)	N/A	N/A
Continuous Learning	<b>Effective Written Communication in a Project Environment (PEL 77801) – Custom program for OPG:</b> Under a five (5) year agreement (2018-2023), course offerings may run multiple times each quarter (based on OPG scheduling).	One (1) course offering (6 Hours)	N/A	N/A
Continuous Learning	★ <b>Custom Leadership Program:</b> Municipality of Port Hope	30 Hours	25	N/A
Continuous Learning	★ <b>Custom Leadership Program:</b> City of Peterborough	36 Hours	25	20
Continuous Learning	★ <b>Custom Leadership Program:</b> Five Counties ( <i>*Early Childhood Educators Program*</i> ) - We also have 2 new programs beginning this fiscal year with <u>Five Counties</u> and another with the <u>Early Years Group</u> all designed for ECE's and Educators.	36 Hours	25	7

Faculty or Non-academic Unit	Brief Description of Offering	Number of Hours or Length of Offering	Number of registrants **	Number of certificates awarded
Continuous Learning	 <b>Custom Police Leadership Program:</b> Cobourg Police Services - A certificate program designed to develop leadership strategies aligned with Cobourg Police core competencies. The program consists of three (3) modules, each with four (4) weeks of online content and one (1) half-day, in-class workshop.	36 Hours	25	22
Continuous Learning	<b>AQ/ABQ Program:</b> AQ custom courses deepen the knowledge/skills needed to design, deliver, and assess programs in a specific discipline, field and/or division. Offered in one (1) to three (3) sessions, courses expand to offer a specific focus on leadership skills within the discipline or division. ABQ custom courses qualify Ontario College of Teachers (OCT) members to teach in specific divisions in addition to current division qualifications. At Intermediate and Senior levels, qualification is based on specific subjects: Math, Science, English, Philosophy and Social Sciences. AQ/AQB courses are available to OCT members only.	125 hours; 12 (Twelve) course offerings	75	75 <i>Note: Certificate recorded by OCT.</i>
Continuous Learning	<b>Math and Coding – Elementary:</b> A custom professional development course designed	16 hours; One (1)	8	8

Faculty or Non-academic Unit	Brief Description of Offering	Number of Hours or Length of Offering	Number of registrants **	Number of certificates awarded
	to help in-service elementary educators prepare and grow within the new math curriculum.	course offerings		
Continuous Learning	<b>Charles H. Best Type 2 Diabetes Educator Program</b> 10 asynchronous modules	Self-paced	18 Full Program 13 Individual Modules	4

\*\*Some Continuous Learning certificate programs allow individuals to sign-up for courses individually without completing the full certificate program. The number of registrants refers to the number of individuals who registered for any course(s) offered as part of this program. All certificates were counted once, regardless of the number of individual course registrations in the certificate program they registered for. An “N/A” in this appendix means that individual courses in this certificate program were custom programs, not open to the general public for registration.

# COMMITTEE REPORT

---

**SESSION:**

Public   
Non-Public

**ACTION REQUESTED:**

Decision   
Discussion/Direction   
Information

**TO:** Strategy & Planning Committee

**DATE:** May 11, 2023

**PRESENTED BY:** Dr. Lori Livingston, Provost and Vice-President, Academic

**SUBJECT:** International Student Recruitment Strategy Update

---

**COMMITTEE/BOARD MANDATE:**

The Strategy and Planning Committee (Committee) is responsible for overseeing all aspects of the university’s strategic planning efforts, including the implementation and assessment of these plans in the context of the university’s vision, mission and values.

We are updating the Committee on our strategic approach to undergraduate student recruitment from international markets, including a brief summary on our efforts over the past year. The purpose is to prompt further discussion on what additional strategies we need to consider and/or pursue going forward.

**BACKGROUND/CONTEXT & RATIONALE:**

At its January 2022 meeting, the Committee engaged in a strategic discussion focused on the University’s international recruitment strategy. International recruitment remains a key priority for Ontario Tech and especially so given the anticipated continuation of domestic tuition freezes for some time to come. We remain resolute in our commitment to grow international enrolments to represent about 15% of the total student body.

The attached slide deck aims to provide the Board with critical information on: (a) past, present and future international student enrolments; (b) international student recruitment and market development activities; (c) international student supports; and, (d) our strategic and tactical priorities for 2023-2026.

**NEXT STEPS:**

A strategic and tactical approach to recruiting international students is critical to ensure that we realize our desired and sustainable year-over-year enrolment goals. Even though the pandemic is more or less behind us, we will need to continue investing effort into a broad array of recruitment initiatives and opportunities to ensure that we can attract and retain high-quality international students into the future.

---

**SUPPORTING REFERENCE MATERIALS:**

International Strategy Update presentation will be provided at the meeting. Materials not provided in the public package due to market sensitive information.

## COMMITTEE REPORT

---

**SESSION:**

Public   
Non-Public

**ACTION REQUESTED:**

Decision   
Discussion/Direction   
Information

**TO:** Strategy and Planning Committee

**DATE:** May 11, 2023

**FROM:** Brad Maclsaac

**SUBJECT:** Annual Endowment Disbursement

---

**COMMITTEE MANDATE:**

The Board of Governors is responsible for overseeing the financial affairs of the University with respect to all auditing, financial reporting, and system controls, budget approval, and investment of the university's endowment funds to ensure that appropriate financial controls, reporting processes and accountabilities are in place at the University.

As outlined in the Endowment Management Policy and Procedures, approval of the disbursements is to be recommended by both the Audit and Finance and Strategy and Planning Committees to the Board of Governors.

This memo is to seek Strategy and Planning Committee's endorsement to the Board of Governors of a maximum spending level from the Endowment portfolio for fiscal year 2023-2024. The proposed disbursement was endorsed by the Audit and Finance Committee on April 12, 2023.

**BACKGROUND/CONTEXT & RATIONALE:**

This report will highlight earnings, disbursements, and the net position of the Endowment fund.

Endowments typically accumulate assets and disperse income to beneficiaries over extended periods of time. Ontario Tech's Endowment consists of funds, largely donations secured through Advancement, which are set aside permanently with a portion of investment returns used to support specific student awards as directed by the Donor. Part of Ontario Tech's endowment philosophy includes 'capital preservation' (i.e. adjusting the capital value by inflation) so as to preserve the purchasing power of the awards. Effective oversight requires facing the contradictory goals of maintaining a target spending rate and preserving the real value of the fund while operating in an environment of unpredictable shifts in markets.



In general, donor agreements set out an expectation of up to 4% disbursement of the inflation-adjusted principal (original donation). Increases in donor awards are in discrete increments and vary by award. Ontario Tech assumes the long-term sustainability is supported by establishing a disbursement rate of approximately 3-5% based on a variety of reports (i.e. Morneau Shepell's Funding Sustainability [report.](#))

Over time, the value of the portfolio has experienced significant growth. A summary of the current portfolio cumulative balances (as at March 31) are as follows (all numbers in 000's):

Endowed balance as at March 31 ('000s)		2020 Actual	2021 Actual	2022 Actual	2023 Forecast	2024 Proposed
Donations (Principal Value)	A	17,892	18,616	19,158	19,768	20,378
Realized Income (ii)	B	8,959	9,760	10,608	11,463	12,302
Awards disbursed	C	(3,420)	(4,131)	(4,849)	(5,361)	(5,948)
<b>Total adjusted cost base</b>	<b>D=A+B+C</b>	<b>23,431</b>	<b>24,245</b>	<b>24,916</b>	<b>25,870</b>	<b>26,733</b>
<b>Market Value</b>	<b>E</b>	<b>26,020</b>	<b>31,771</b>	<b>33,123</b>	<b>32,992</b>	
<b>Unrealised Gains (iii)</b>	<b>F=E-D</b>	<b>2,589</b>	<b>7,526</b>	<b>8,206</b>	<b>7,123</b>	

#### Key facts:

- i. There are currently 134 specific endowed funds.
- ii. Realized income net of fees (i.e. interest, dividends, realized gains) has averaged 4.4% since 2004
- iii. With the deterioration of both the bond and equity markets in the last 12 months, total adjusted unrealized gains on the endowment fund have decreased over the last year and are projected to be at \$7.1M at the end of fiscal year 2022-2023.

Disbursement amounts and number of awards have been as follows:

Disbursement Year	No of awards disbursed	Amount (\$'000's)	Distrib. % <sup>1</sup>
2018	261	\$475	3.0%
2019	309	\$617	3.7%
2020	277	\$493	2.7%
2021	409	\$711	3.8%
2022	409	\$700	3.5%
2023 Forecast	411	\$710 <sup>2</sup>	3.5%
2024 Proposed	455	\$750 <sup>2</sup>	3.3%

<sup>1</sup> Presents distributions as a percentage of inflation adjusted donations

<sup>2</sup> Due to the higher level of capital preservation in 2022/23, some of the newer endowment funds have not generated sufficient investment income and capital gains to support the endowed disbursements. The disbursements for these Funds are being partially funded by unrestricted expendable sources (\$200k in 2022/23 and \$279k in 2023/24).

## **CONSULTATIONS:**

The university's Endowment Committee consists of representatives from Finance, Advancement and Financial Aid.

Due to increased donations and a stable portfolio, Ontario Tech has been able to increase disbursements over the last couple of years. In the current environment of high interest and inflation rates, the committee notes that it is even more critical than ever to continue to support students.

Based on a review of the portfolio performance, and allowing for a capital preservation of 3.0% (average inflation rates over the last 4 years), the Committee recommends a maximum disbursement of \$750k from the endowment fund which would allow support of 455 students whilst still preserving the capital of the fund.

The Committee continues to review the performance of the endowment fund, the impact of inflationary pressures, and the ability of the University to continue to disburse awards to students in the future, including the disbursement of a portion of the unrealized gains on the fund. A review of the endowment policy and procedures is underway.

## **MOTION:**

*That the Strategy and Planning Committee endorses to the Board of Governors the disbursement of up to \$750,000 from the University's endowed fund and unrestricted expendable sources for distribution by Financial Aid in 2023-24.*

**BOARD OF GOVERNORS**  
**Strategy & Planning Committee (S&P)**

---

**Minutes of the Public Session of the Meeting of March 22, 2023**  
**2:00 p.m. to 4:03 p.m. Videoconference**

**Attendees:** Lynne Zucker (Chair), Eric Agius (Interim Chair), Ahmad Barari, Kevin Chan, Laura Elliott, Mitch Frazer, Matthew Mackenzie, Steven Murphy, Michael Rencheck, Joshua Sankarlal, Jim Wilson

**Staff:** James Barnett, Sarah Cantrell, Sara Gottlieb, Les Jacobs, Lori Livingston, Brad MacIsaac, Fiona McArthur, Kimberley McCartney, Lauren Turner

**1. Call to Order**

The Chair called the meeting to order at 2:00 p.m. and read aloud the land acknowledgement.

**2. Agenda**

*Upon a motion duly made by M. Rencheck and seconded by E. Agius, the Agenda was approved as presented.*

**3. Conflict of Interest Declaration**

There was none.

Kevin Chan joined the meeting.

**4. Minutes of Public Session of Meeting of January 12, 2023**

*Upon a motion duly made by M. Rencheck and seconded by M. Mackenzie, the Minutes were approved as presented.*

**5. Chair's Remarks**

The Chair welcomed the Committee and guests to today's meeting; she also welcomed Michael Rencheck to his first meeting as a Committee member. The Chair then commented positively on two recent professional development sessions for governors: (i) L. Jacobs presented on Faculty Research in February; and (ii) the morning's session on Telling Our Story. She also highlighted the recent Project Arrow tour, expressing pleasure at having the opportunity to speak to the students who worked on the concept car. Turning to the day's agenda, she encouraged Committee members to bring their expertise to bear on the important items before them.

Ahmad Barari and Mitch Frazer joined the meeting.

## **6. President's Remarks**

The President provided an update on a number of items including the striking of the Government of Ontario's Blue-Ribbon Panel, the growth of the University's in-demand programs and the growth in Ontario Tech's research funding and standing as a small research-intensive university. To attempt to mitigate financial pressures from the ongoing tuition and grant freeze, he highlighted strategies in three key areas: (i) growth in high-demand areas; (ii) growth in international student enrolment to a targeted 15%; and (iii) leveraging real estate. He advised the Committee that while the University hopes that the province will agree to an across-the-board tuition increase, planning will proceed on the assumption that there will not be one. He then acknowledged the work of the Provost on the Integrated Academic Research Plan, its uniqueness in higher education, and the forthcoming targets which will be presented to the Committee later in the spring. He closed by commenting on the passing of Helen Vari, who, along with her late husband George, was a great friend and generous donor to the higher education sector.

## **7. Advancement**

### **7.1 Strategic Discussion: Campus Master Plan**

B. Maclsaac presented an overview of developments on the Campus Master Plan over the last 14 months, highlighting investments in the downtown campus, the reduction of leased space, significant renovations in Charles Hall, and a successful reclassification of Charles Hall with the Ministry to make it eligible for a renewal grant. He noted the recent purchase of 55 Bond Street, which is also aligned with the Plan.

He then turned to the enrolment scenarios described in the materials, outlining the attendant expansion in space needs for each. Space, it was noted, includes not only academic spaces but also commercial services such as food and housing as well as transportation. B. Maclsaac advised that the University has significant volumes of potential expansion designs should government funding become available. He also noted that revisions to the joint campus master plan are underway with Durham College along with discussions about future building placements. B. Maclsaac ended his remarks with the subject of housing, highlighting the University's shift towards a "Sticky Campus" from a previous commuter campus orientation.

The Committee congratulated the leadership team on reducing the ratio of leased space to 6%. In response to a question, B. Maclsaac confirmed that attracting international students is a key consideration in the discussion about housing and that the Ontario Tech Student Union has been engaged on the issue. A consultant retained by the University has collected survey data that shows an unmet demand for housing and an international student preference to reside on campus.

Kevin Chan left the meeting.

In response to a question about lease reductions, B. Maclsaac confirmed savings of \$1.2 million/year by moving out of 11 Simcoe and no additional cost to moving into Campus Corners. He highlighted the benefits of lease-to-own partnerships, including building assets, on the University's financial statements. In response to a question, B. Maclsaac confirmed that space needs were modelled on significant reduction from sector standards recognizing the University's drive for efficiency as well as aggressive reductions in administrative space. He advised that the Provost's Office has detailed data that allows for accurate assessments of instructional space needs. The Provost added that the Integrated Academic Research Plan pushes the University towards increased hybrid and virtual course offerings; she cautioned however that some programs do not lend themselves to those platforms due to professional accreditation requirements or learning and competency expectations.

A discussion of housing considerations then ensued. J. Sankarlal shared student concerns, including reductions in OSAP, pressure on living expenses, and the importance of safe accommodations. With respect to the latter, the potential vulnerability of international students due to language barriers was highlighted. In response to a comment, B. Maclsaac confirmed that he will work with the Provost to determine the best path for consultation with the broader University community on the issue. In response to a question, B. Maclsaac advised that the University surveys students who decline offers to the University; he further advised that first year residence is guaranteed.

## **7.2 Research Strategy**

L. Jacobs presented the Research Strategy, noting that this discussion builds on the presentation delivered during an optional professional development session in February. He shared the view that commercialization of research is a unique differentiator at the University, particularly its approach of responding to partners' needs with specific research activities.

He then discussed two initiatives immediately on the horizon for the University: (i) a hydrogen commercialization and demonstration centre; and (ii) supply chains for small modular reactors (SMRs). With respect to the former, he shared that over \$1 million in public grants have been secured and a soft launch is proximate. He invited Committee feedback on indicators of success and the University taking a leadership stance in these spaces. In response to a question, L. Jacobs confirmed that the University has Brilliant Venture and an accelerator incubator. He also noted Brilliant Catalyst and how it is part of the same ecosystem, sharing that there are 130 startups in his office. The Committee suggested ensuring that problem-solving for industry and the attraction of venture capital and capitalization on intellectual property (IP) be defined separately. In response to a question about IP and incentivization of academics to participate, L. Jacobs advised that the IP Policy is being refreshed this year to align with those objectives.

L. Jacobs advised the Committee that the first chair of SMR was named this year and that the University is currently seeking technical and marketing staff. A discussion then ensued on metrics and reputational impacts. The Committee encouraged a thoughtful approach to alignment between research endeavors and the overall reputation that the University is seeking to build. A brief discussion ensued on the benefits of multidisciplinary projects and not focusing solely on a program or initiative's profitability.

### **7.3 Micro-credentials**

S. Cantrell provided opening remarks on Micro-credentials, advising the Committee that Ontario Tech has piloted innovative offerings for the last few years that upskill both traditional and non-traditional students; efforts are now moving towards scalability of micro-credential programming.

Jim Wilson joined the meeting.

F. McArthur then provided an overview of the micro-credentials available at Ontario Tech, highlighting a focus on authentic assessments and demonstrable evidence of learning. She shared with the Committee the pathways that learners may pursue, some of which are integrated into academic programming. She described the grant funding received from the TD Ready Commitment and some of the practical skills that learners can obtain; she noted that Ontario Tech owns the intellectual property at the end of the contract. Turning to the sustainability of offering micro-credentials, she advised the Committee that a process for development and approval of expanded content is being formalized.

A discussion then ensued on the potential of micro-credentials. In response to a question, S. Cantrell confirmed that a future state may include university credits built on micro-credentials. In response to another question, S. Cantrell advised that the audience for micro-credentials is both students and those external to the University. She highlighted the value of career readiness skills for students. In response to a further question, she expressed the view that the offerings from Ontario Tech TALENT are sufficiently distinct, particularly in the award of digital badges, to allow both organizations to succeed.

Looking to the future, S. Cantrell advised the Committee that a white paper is currently underway that outlines opportunities, describes synergies with academic and student success goals, and presents a sustainable business model that diversifies the University's portfolio of offerings. A brief discussion ensued on defining success, a future state of University-level credentials with plug-and-play components, and the changing ways that employers approach training and development for employees.

## **8. Planning**

### **8.1 Board Retreat Update**

The President provided an update on Board Retreat planning, advising the Committee that K. Menard has been retained as a facilitator; he provided a brief summary of her qualifications. Building on the momentum of the professional development session this morning, the Retreat will focus on refining and crystallizing key messages about the University and to solidify a plan for governors' ambassadorial roles.

## **9. Significant Project & Contract Oversight**

### **9.1 Capital Project Tracking Sheets**

B. MacIsaac presented the Capital Project Tracking Sheets, noting the revisions made in response to Committee and Board feedback. He drew the Committee's attention to investments in infrastructure that will lead to energy savings and forward-looking investments in Information Technology including future migration to the cloud. With respect to the latter, he noted that there will be a discussion about this next year that will include considerations of flexibility and security.

### **9.2 Subcritical Nuclear Assembly**

L. Jacobs presented an update on the Subcritical Nuclear Assembly, highlighting the public announcement launch at the Canadian Nuclear Association in February and ongoing engagement and consultation activities.

### **9.3 Brilliant Venture**

L. Jacobs presented on Brilliant Venture, a new initiative that drives forward the mandate to democratize entrepreneurship at the University. He noted that most leading universities have a venture fund of some sort and that Ontario Tech wishes to compete on that stage alongside them. He went on to advise the Committee that he has been working closely with S. Gottlieb with the aspiration of starting to fund startups in the fall. The Committee expressed enthusiasm for Brilliant Venture. In response to a question, L. Jacobs shared that assessors of potential startups will include himself, the President and Vice-Chancellor, the Vice-President, Administration, the Deputy Provost and the Director, Creativity & Entrepreneurship; the due diligence process is under development. In response to a further question, L. Jacobs confirmed that communications about Brilliant Venture are also in development and that he will be working with the Advancement Office on potential synergies.

## **10 Adjournment**

*Upon a motion duly made by E. Agius, the public session adjourned at 4:03 p.m.*

Lauren Turner, University Secretary

# Strategy & Planning Committee (S&P)

## 2022-2023 Annual Report



# 2022-2023 Work Plan

## MANDATE-DRIVEN PRIORITIES

### Strategic & Planning Oversight

- Integrated Academic Research Plan
- Strategic priorities
- Student success
- International strategy
- Research strategy
- Standard & strategic indicators
- Academic programming
- Board Retreat planning

### Advancement

- Matching Fund; New Campaign
- Endowment disbursement
- Campaign oversight
- Alumni engagement strategy

### Major Projects Oversight

- Campus Master Plan
- Capital Project Tracking
- Subcritical Nuclear Assembly

# Accomplishments

## STRATEGIC OVERSIGHT

- Annual review Committee Terms of Reference and Work Plan
- Oversight of University's strategic planning metrics
- Oversight of student-centric initiatives, including discussions on the following:
  - Enrolment
  - Recruitment
  - Student success
  - Academic programs
  - International strategy
- Oversight of Board of Governors Retreat
  - Retreat scheduled for May 11, 2023
  - Retreat outcomes to be reported to June Board of Governors

# Accomplishments

## PLANNING OVERSIGHT

- Oversight of progress on the Integrated Academic Research Plan, including establishing targets for metrics
- Recommended disbursement of up to \$750,000 from the Endowment Funds to be distributed as awards in 2023-24

## PROJECT OVERSIGHT

- Ongoing efforts to advance the Campus Master Plan
- Capital Project Tracking Sheets
- Subcritical Nuclear Assembly

## ADVANCEMENT

- Oversight of wind-down of Matching Fund and planning for new Advancement campaign
- Worked with Advancement to identify and open doors to major gift prospects

# In Progress

## Strategy & Planning

- Continued oversight of the Integrated Academic Research Plan

## Major Projects

- Continued oversight of Campus Master Plan

## Advancement

- Continued oversight of new campaign
- Continue to develop major gift prospects

# Future Planning

## Planning Oversight

- Integrated Academic Research Plan 2023-2028
- Oversight of Integrated Academic Research Plan – performance against targets

## 2024 Board Retreat